

MISSOURI ECONOMIC & WORKFORCE REPORT

2019



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- Missouri's GDP totaled \$282.2 billion in 2018, inflation-adjusted dollars, a 2.3 percent increase over the previous year.
- Missouri's payroll employment increased 1.1 percent from May 2018 to May 2019, adding 31,000 new jobs.
- Missouri's per capita personal income was \$46,635 in 2018, up 3.6 percent from 2017 in nominal terms.
- Missouri's unemployment rate was 3.3 percent in May 2019, up just 0.1 point from last year.
- Missouri's labor force participation rate was 63.8 percent, slightly higher than the nation's 62.9 percent in 2018. Nationally, as well as statewide, the number of older Americans (65+) staying in the labor force is increasing.
- The Health Care & Social Assistance industry employed the most people in Missouri, with over 465,600 employees in 2018. Retail trade was second (311,300), and Manufacturing was third (273,400).
- The Manufacturing industry added 7,525 jobs to the Missouri economy in 2018. Health Care & Social Services industry added 4,116 jobs, Professional and Technical Services added 3,428, and Accommodation and Food Services added nearly 1,600. The Retail industry lost nearly 2,600 jobs and was the industry with the largest job decline.
- Health Care and Business & Management related jobs are the most in-demand occupations based on a measure of online job advertisements.
- Both the Ozark and Kansas City regions have had employment growth rates higher than the state average in five of the past six years.

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# MISSOURI WORKFORCE 2019 CURRENT TRENDS

Missouri's Gross Domestic Product in 2018 was \$282 billion, in inflation adjusted dollars, up 2.3 percent from the previous year. Missouri's GDP growth has lagged behind the U.S. since 2010, but in 2018 Missouri was only 0.6 points below U.S. Real GDP growth (2.9 percent). The Missouri economy added 31,000 jobs from May 2018 to May 2019 and 237,700 jobs since 2011. In 2018, the Manufacturing, Health Care and Professional, Scientific & Technical Service industries were leading the job growth.

In May 2019, the Missouri unemployment rate was 3.3 percent, up just 0.1 point from May 2018. The U.S. unemployment rate was 3.6 percent in May 2019. Labor Force participation was at 63.8 percent, up from 62.9 percent in 2017.

The sustained low unemployment rates coupled with economic growth throughout 2018 and into 2019, create a tight labor market for Missouri—which means fewer people are looking for work as employers are looking to increase production to meet new economic demand. A tight labor market can result in increased wages as employers compete for workers, but it also means economic growth can be stunted, as new demand within the economy is not met due to a lack of qualified employees to spur further production.

Regions with large metro areas, which tend to have economies that are more diverse, have been leading the way in employment growth in Missouri over the past five years—Kansas City Region with 8 percent growth, Ozark Region with 7 percent growth, and St. Louis Region with 5.2 percent growth. Missouri overall, grew 4.8 percent during that time. More rural regions, with economies centered around manufacturing and agriculture, have had lower levels of employment growth over that time.

In this overview of the Missouri economy, changes in gross state product, personal incomes, civilian labor force, unemployment, and employment are analyzed for the current period and more broadly over the last five and 10 years for trend analysis. Moreover, in this review, special attention is paid to economic regions within Missouri—their diverse workforce and economies.

THE SUSTAINED LOW UNEMPLOYMENT RATES COUPLED WITH ECONOMIC GROWTH THROUGHOUT 2018 AND INTO 2019, CREATE A TIGHT LABOR MARKET FOR MISSOURI.



#### **GROSS DOMESTIC PRODUCT (GDP)**

Gross Domestic Product (GDP) is the broadest measure of economic activity. This measure tracks the market value of goods and services produced within a nation or state for a particular period of time. In 2018, Missouri's GDP was \$282.2 billion (in 2012 chained dollars); this is a 2.3 percent increase over 2017. Nationally, GDP increased 2.9 percent over the same period.

Missouri's annual growth rate continues in an upward trend from 2016. In 2016, Missouri experienced slower growth, dropping 2.1 points from the previous year, but then gained 1.9 points in 2017 to reach 0.9 percent growth and another 1.4 points in 2018 for a 2.3 percent growth rate, nearly matching the 2.4 percent growth from 2008.

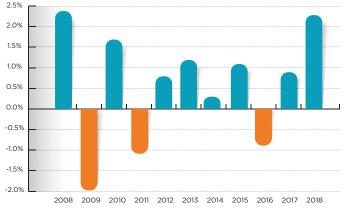
The state's GDP growth, from 2017 to 2018, performed better than each of the contiguous states, with exception to Tennessee which had the highest GDP percentage growth at 3.0 percent.

Most industry sectors in Missouri show overall GDP growth trends from 2008 to 2018. The greatest gains in the past 10 years has been in the Professional, Scientific, and Technical Services industry with 26.7 percent overall increase or 2.2 percent annual growth. Other 10-year trends include year-over-year growth in Utilities at about 1.7 percent each year, Health Care and Social Services at 1.5 percent annual growth, and Wholesale Trade at 1.1 percent annual growth. In this past year, Missouri showed higher growth in the Information sector at 11.6 percent growth, Manufacturing at 7.1 percent growth, and Wholesale Trade at 6.7 percent growth.

In 2008, Missouri produced 270.6 billion in goods and services compared to 282.2 billion in 2018. Missouri grew at an annualized 0.5 percent to equal 11.6 billion in growth over the past 10 years or 5.8 percent GDP increase overall.



#### Missouri Real Gross State Product Annual Growth Rate

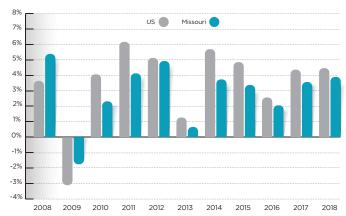


SOURCE: U.S. BUREAU OF ECONOMIC ANALYSIS, REAL GDP IN 2012 CHAINED DOLLARS

Per Capita Personal Income is a rough indicator of the economic well-being of an area's residents. Per capita income is calculated by dividing an area's total personal income by its population. The average annual income of a Missouri citizen in 2018 was \$46,635 and nationally it was \$53,712. While the state's per capita income is lower than the national average, so is the cost of living. In 2018, Missouri ranked 4th in lowest cost of living for all states.

The pace of income growth at the national level has generally been faster than Missouri's, though the state mirrors the nation in positive growth. From 2008 to 2018, annual nominal growth rates for the U.S. total personal income increased an average 2.8 percent and Missouri total personal incomes increased an average 2.3 percent.

#### Personal Income Annual Growth Rate



SOURCE: U.S. BUREAU OF ECONOMIC ANALYSIS, 2018. NOMINAL RATES NOT ADJUSTED FOR INFLATION.

## MISSOURI OVERVIEW

Among surrounding states, Tennessee increased by 3.0 percent, Arkansas by 2.9 percent, Illinois by 2.8 percent, Nebraska by 2.6 percent, Kentucky by 2.5 percent, Iowa by 2.4 percent, Kansas by 2.1 percent, and Oklahoma by 1.8 percent.

#### **TOTAL PERSONAL INCOME**

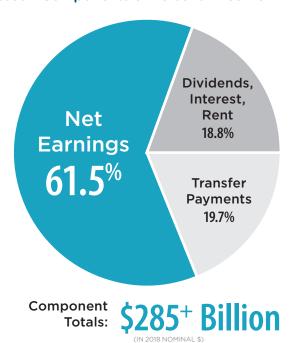
Total personal income includes the wages and salaries of workers and other income received such as dividends, interest, rent, and transfer payments. Transfer payments refer to Social Security, Medicare and Medicaid, Unemployment Insurance, and other government benefits. Incomes are reported before the deduction of taxes

Nearly 20 percent of total personal income is transfer payments. Transfer payments are monies paid out by the government to individuals through Social Security, Disability Insurance, Medicare, Unemployment Insurance compensation, Veterans benefits, Education and Training Assistance programs (Pell Grants for example), and low-income assistance benefits (which include SSI, Medicaid, CHIP, and TANF).

The Federal government made over \$2.9 trillion in transfer payments in 2018 with Missouri residents receiving about \$56.4 billion in payments.

Over the last 10 years, the transfer payments share of total personal income has grown by 1.2 percentage points; nationally, from 15.7 percent in 2008 to 17.0 percent in 2018; and statewide, from 18.0 percent in 2008 to 19.7 percent in 2018. Social Security and Medicare make up the largest share of transfer payments.

#### Missouri Components of Personal Income



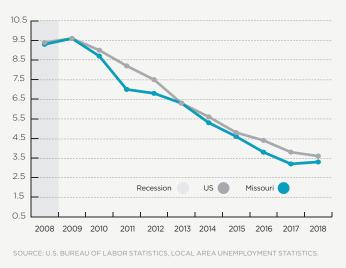
#### UNEMPLOYMENT

Unemployment Rate measures the number of persons out of work but actively seeking employment relative to the civilian labor force. As of May 2019, the nation's unemployment rate was 3.6 percent. Missouri's unemployment rate was 3.3 percent, representing 101,321 Missourians out of work. May 2019 makes 27 consecutive months of unemployment rates below 4 percent.

This continued low unemployment, both in the U.S. and Missouri, results in a tight labor market—which means fewer people are looking for jobs while the economy needs more employees to meet growing demand.

The result can be good for workers, as there is upward pressure on wages as employers compete for their service. The downside to the tight labor market is that it limits the growth that is possible within the economy, as producers are not able to find the employees they need to expand production and increase productivity.

#### **Unemployment Rate**



OUTPERFORMED
THE NATION IN
CIVILIAN LABOR FORCE
PARTICIPATION RATES.

#### SOURCE: U.S. BUREAU OF ECONOMIC ANALYSIS, 2017

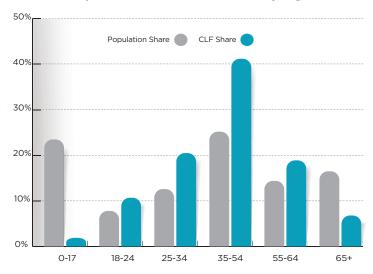
## MISSOURI OVERVIEW

#### **CIVILIAN LABOR FORCE**

Civilian Labor Force is defined as the number of noninstitutionalized persons—16 years and older—who are either gainfully employed or are unemployed but actively seeking work, which totals 3.1 million in Missouri for 2018. According to data from the Bureau of Labor Statistics, in 2018 the 35 to 54 age cohort comprised 25.2 percent of Missouri's population and 41.2 percent of its civilian labor force. The 65+ age cohort makes up 16.5 percent of the population and 6.8 percent of the civilian labor force. In 2008, the 65+ age cohort comprised 12.7 percent of the population and 3.6 percent of the civilian labor force.

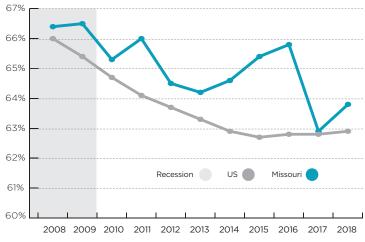
Income growth, and by extension growth in the economy, is affected by labor force participation. The labor force participation rate (LFPR) is the ratio of the civilian labor force to the population. The national LFPR climbed to a peak of 67 percent by 1990 where it seemed to stabilize. However, since 2001 the LFPR has been falling.

#### Missouri Population and Labor Force by Age Cohort



SOURCE:U.S. CENSUS BUREAU, CURRENT POPULATION SURVEY; U.S. BUREAU OF LABOR STATISTICS, LOCAL AREA UNEMPLOYMENT STATISTICS, 2018

#### **Civilian Labor Force Participation Rates**



SOURCE: U.S. BUREAU OF LABOR STATISTICS, LOCAL AREA UNEMPLOYMENT STATISTICS

In the last 10 years, the Missouri LFPR has averaged about 65 percent. More Missourians—as a share of the state's working age population—participate in the labor force when compared to the U.S. In 2018 Missouri, at 63.8 percent, was 0.9 points higher than the U.S. LFPR of 62.9 percent. There is an overall downward trend from 2008 to 2018 for both Missouri and the nation.

In 2018, four of Missouri's neighboring states had a higher LFPR: Nebraska (69.8), Iowa (68.5), Kansas (66.7), and Illinois (64.5). Arkansas, Kentucky, Tennessee, and Oklahoma each scored lower than 63.8 percent.

Missouri has consistently outperformed the nation in civilian labor force participation rates. Starting in 2013 the participation rates for Missouri began to diverge from the nation's rates, outperforming the U.S. by 0.9 points in 2013, 1.7 points in 2014, 2.7 points in 2015, then peaked out at 3.0 in 2016 where the rates started closings ranks again—Missouri only had a 0.1 points difference in participation rates in 2017, but by 2018 the rates began to climb again.

## NONFARM PAYROLL EMPLOYMENT

Nonfarm Payroll Employment increased 1.6 percent nationally, between May 2018 and May 2019. Missouri increased by 1.1 percent, adding 31,000 jobs from May 2018 to May 2019.

From May 2011 through May 2019, the nation added over 19.4 million jobs to the economy, an average increase of 1.3 percent annually. Missouri added 237,700 jobs, increasing an average of 0.8 percent annually.

#### 3% 2% 1.7% 1.6% 2.1% 0.5% 0.4% 1.1% 0.5%

**Payroll Employment Annual Growth Rate** 

-5% 2008 2009 2010 2011 2012 2013 2014 2015 2016 2017 2018 2019

NOTE: YEAR-OVER-YEAR, ANNUAL DATA SOURCE: U.S. BUREAU OF LABOR STATISTICS, CES

-4%

## MISSOURI OVERVIEW

#### **EMPLOYMENT CHANGE BY INDUSTRY**

Employment change by industry identifies the types of jobs being created in the state. Industries with increasing employment indicate a greater need within that sector for Missouri. There are also industries that behave more cyclically, growing during economic expansion and decreasing in times of economic slowdown or contraction.

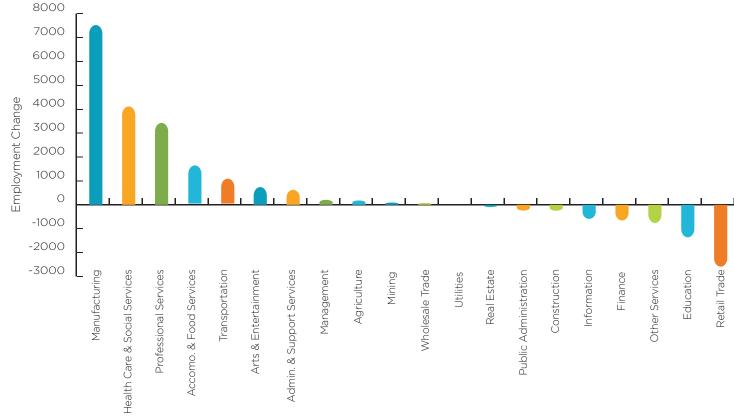
These changes are crucial for identifying both the types of occupational job-loss that is occurring and industries that are expanding or hiring. Tracking employment change throughout the year identifies industries that are affected by employment changes.

Twelve out of 20 two-digit NAICS industries added jobs between 2017 and 2018. For the most part, Utilities maintained its previous employment numbers and Real Estate had minor employment loss.

The largest increases for Missouri industries were in Manufacturing which gained 7,525 workers; Health Care and Social Services which added 4,116 workers; Professional Services which added 3,428 workers, and Accommodation and Food Services which added 1,597 workers.

The largest industry losses were in Retail Trade with 2,589 workers and Education with 1,361 workers lost. With most of the sectors showing employment increases, it bodes well for Missouri's continued economic growth.

#### Missouri Employment Change by Industry Sector 2017-2018



SOURCE: MERIC ANALYSIS OF THE QUARTERLY CENSUS OF EMPLOYMENT AND WAGES MICRO-DATA, 2017 TO 2018



This report was prepared by the staff of the Missouri Economic Research and Information Center (MERIC) as part of the Missouri Workforce 2019 Report. All data in this report was current at the time of publication and is subject to revision. Additional details on data sources can be found in the full report.

This workforce solution was funded by a grant awarded by the U.S. Department of Labor's Employment and Training Administration The solution was created by the grantee and does not necessarily reflect the official position of the U.S. Department of Labor. The Department of Labor makes no guarantees, warranties, or assurances of any kind, express or implied, with respect to such information, including any information on linked sites and including, but not limited to, accuracy of the information or its completeness, timeliness, usefulness, adequacy, continued availability, or ownership.



Missouri's economy is diverse and varies by geography, natural resources and population. To better understand the state's economy, the following section analyze the various regional economies. The state is divided into ten regions, as shown in the map below. These regions were developed using the Workforce Development Areas created by the Workforce Investment Act of 1998 and continued with the Workforce Innovation and Opportunity Act of 2014. For a list of the economic regions used in this analysis and the counties that make up those regions, see Appendix A.

The Missouri Regional Economic Profiles graph provides information on the total 2018 employment (size of the bubble), 5-year annual average employment growth (horizontal axis), and average 2018 wage (vertical axis) within each region. Missouri's largest employing regions have higher levels of employment growth and higher wages. This is a trend occurring throughout the United States.

Kansas City and Ozark are the fastest growing regions in Missouri. From 2013 to 2018 both regions had a 2.0 percent annualized growth rate. The St. Louis region had the third highest employment growth rate, averaging 1.3 percent growth per year. Both the Ozark and Kansas City regions have had employment growth rates higher than the state average in five of the past six years.

The Central Region averaged 0.8 percent employment growth from 2013-2018, below the state average employment growth of 1.2 percent.

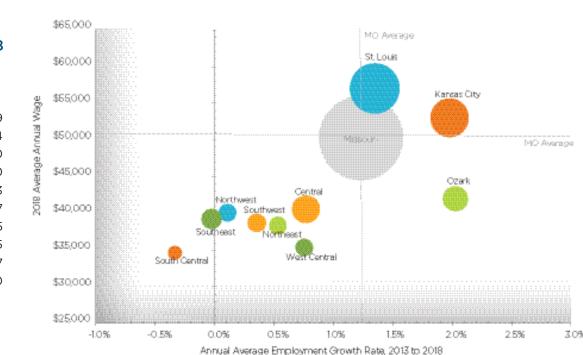
The Northeast, Northwest, and West Central regions have had employment growth slow from 2016 to 2018. Each region grew from 2016 to 2017 but declined again from 2017 to 2018 by -0.6 percent, -0.7 percent and -1.7 percent respectively.

The Southwest and Southeast regions experienced the opposite effect and declined in growth from 2016 to 2017, but then had positive growth in 2018 at 0.5 percent and 0.6 percent respectively.

#### Missouri Regional **Economic Profiles 2018**

**Bubble size represents** number of employees





SOURCE: CENSUS QWI EXPLORER — 2013-2018 2ND QUARTER EMPLOYMENT & WAGES



The Central Region is comprised of 19 counties in the center of Missouri. This region is home to several cities including Columbia, Mexico, Rolla, Camdenton, Lebanon, and the state capital, Jefferson City.

The Central Region workforce has 312,799 employees, making up 10.6 percent of Missouri's employment. In 2018, 51 percent of the workforce was female and 49 percent was male, which matches the Missouri average.

The workforce is getting older in the Central Region, a trend happening throughout Missouri and the U.S. In 2018, 23 percent of the workforce was age 55 or older, up from 18 percent a decade earlier.

For the region, 11 percent of the workforce was non-white, compared to 17 percent for the state; 3 percent of the region's workforce was Hispanic or Latino, compared to 4 percent for Missouri.

For 6 percent of the region's population (ages 18 to 64) the primary language spoken at home is something other than English. By comparison, Missouri was at 7 percent and the U.S. population at 23 percent.

The Central Region has a higher percentage of the population with a disability compared to the state and nation. For the Central Region, 14 percent of the population has a disability compared to 13 percent in Missouri and 10 percent in the U.S.



#### **Workforce Demographics**

	Central MO	Missouri	Nationwide
Average monthly employment in 2018	312,799	2,954,808	155,761,000
Average Unemployment Rate in 2018	3.0%	3.2%	3.9%
Female	51%	51%	50%
Male	49%	49%	50%
Non-white	11%	17%	23%
Hispanic or Latino	3%	4%	15%
Ages 55 & older	23%	23%	23%
With disabilities (ages 18-64)	14%	13%	10%
Below Poverty Levels (ages 18-64)	17%	14%	14%
Language other than English (ages 18-6	64) 6%	7%	23%
Associate degree or higher (Age 25+)	34%	36%	39%

SOURCES: CENSUS ACS 2017-5YR EST.; BLS QCEW NOT-SEASONALLY ADJUSTED

Educational attainment rates for the Central Region are slightly behind those of the state in regards to bachelor's or advanced degrees. Thirty-four percent of the region's population, age 25 and older, has an associate, bachelor's or advanced degree compared to 36 percent for the state.

The regional unemployment rate was 3.0 percent in 2018 overall, and as of May 2019, the preliminary rate stands at 3.2 percent, an increase from 2.6 percent in May 2018. From May 2014 to May 2019, the unemployment rate dropped 3.1 points.

#### **Educational Attainment**



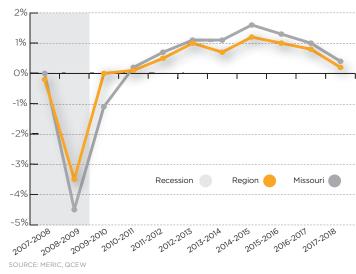
SOURCE: US CENSUS BUREAU, ACS 2017 5-YEAR ESTIMATES

## **CENTRAL REGION**

#### **INDUSTRY ANALYSIS**

The Central Region averaged an annualized 312,799 employees in 2018 and added 542 jobs from June 2017 to June 2018, growing 0.2 percent. Missouri employment increased by 0.4 percent in that time. From 2014 to 2018, the Central Region averaged 0.7 percent annual growth for an overall increase of 3.6 percent; during that same period Missouri's employment grew 4.8 percent.

#### **Central Employment Annual Growth Rate**



The Health Care and Social Assistance industry continues to be one of the largest employing industries in the region, showing consistent growth over the past five years, increasing over 1,000 jobs since 2013. Manufacturing added nearly 1,900 jobs from 2013 to 2018, which is 1.5 percent growth each year.

Accommodation and Food Services added over 2,800 jobs since 2013. Finance and Insurance added just over 1,200 jobs at an annual growth rate of 2.5 percent. Lastly, Administrative and Support also increased over 1,000 jobs with an annual growth rate of 2.2 percent.

#### **Central Region Top Employing Industries**

Industry	Empl 2013	oyment 2018	Net Change	2013-2018 Empl. CAGR	2018 Annual Wages
Health Care & Social Assistance	41,606	42,643	1,037	0.5%	\$40,596
Retail Trade	32,820	33,292	472	0.3%	\$25,128
Educational Services	32,163	31,485	(678)	-0.4%	\$45,600
Accommodation & Food Services	25,263	28,109	2,846	2.2%	\$15,432
Manufacturing	24,887	26,778	1,891	1.5%	\$42,804
Public Administration	27,332	26,672	(660)	-0.5%	\$38,040
Construction	11,789	12,573	784	1.3%	\$42,264
Finance and Insurance	9,151	10,368	1,217	2.5%	\$59,520
Administrative & Support	9,277	10,324	1,047	2.2%	\$25,632
Professional, Scientific & Tech. Serv.	8,398	8,739	341	0.8%	\$50,472

SOURCE: LEHD-QWI, 2013-2018 2ND QUARTER

#### **LOCATION QUOTIENT**

To understand the major industries within a region, an analysis of industry concentration or clustering can be useful. The Location Quotient (LQ) describes the concentration of an industry in a geographic region, in relation to the nation, with 1.0 being the national average. Industries higher than 1.0 indicate a concentration.

The Central Region has higher concentrations in Building Materials and Garden Supplies, Motor Vehicle Parts Dealers, Credit Intermediation & Related Activities, and Management of Companies, just to name a few.

Large employers do not necessarily mean they have a high LQ, though sometimes that is the case. The Central Region's largest employers includes health care providers Boone Hospital, Phelps Regional Medical Center, Capital Region Medical Center, and Fulton State Hospital.

Financial and Insurance industry employers include State Farm Insurance, Veterans United Home Loans, and Shelter Insurance. Higher concentrations of public employers are also found in this region including state government, University of Missouri, and Fort Leonard Wood U.S. Army Base.



#### 2018 Central Region Location Quotients

Industry	Employment	Location Quotient
Gasoline Stations	3,713	2.4
Building Material & Garden Supplies	3,493	1.6
Credit Intermediation & Related Activities	6,811	1.6
Motor Vehicle Parts Dealers	5,061	1.5
General Merchandise Stores	6,522	1.3
Accommodation	4,211	1.3
Sports, Hobby, Music, Book Stores	1,168	1.2
Food Service & Drinking Places	23,854	1.2
Nursing & Residential Care	6,751	1.2
Food & Beverage Stores	5,619	1.1
Machinery Manufacturing	1,990	1.1
Miscellaneous Stores	1,473	1.1
Repair & Maintenance Shops	2,320	1.1
Memberships, Associations, Organizations	2,393	1.1
SOURCE: MERIC, QCEW, 2018 ANNUAL AVERAGES		

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## CENTRAL REGION

Projected growth in industry helps to identify future employment needs for an area. Projections indicate that the largest industry growth in the Central Region will be in Health Care and Social Services, Accommodation and Food Services, Education Services, Administrative and Support, and Professional, Scientific, and Technical Services.



#### Central Region Largest Growth Industries 2016-2026

Industry	Employment 2016 2026 Estimated Projected		Cha 2016- Numeric	_
Health Care & Social Assistance	40,630	47,517	6,887	16.95%
Accommodation & Food Services	28,105	33,590	5,485	19.52%
Educational Services	32,462	35,248	2,786	8.58%
Administrative & Support	9,514	12,111	2,597	27.29%
Professional, Scientific, & Tech. Services	8,107	10,559	2,452	30.24%
Retail Trade	36,785	38,713	1,928	5.24%
Management of Companies	4,596	6,065	1,469	31.96%
Other Services (except Government)	12,198	13,332	1,134	9.30%
Local Government, Excluding Educ. & Hospitals	11,561	12,401	840	7.26%
Transportation & Warehousing	6,998	7,336	338	4.83%

SOURCES: MERIC INDUSTRY PROJECTIONS

## PROJECTED GROWTH IN INDUSTRY HELPS TO IDENTIFY FUTURE EMPLOYMENT NEEDS FOR AN AREA.

#### **OCCUPATIONAL PROJECTIONS**

MERIC produces occupational projections that estimates labor demand over a 10-year period. MERIC categorizes these occupations using its Now-Next-Later method to help job seekers understand the training, education, and experience requirements for various occupations.

**Now** jobs typically require short-term on-the-job training, little to no experience, and/or a high school diploma. Now occupations include Food Service Workers, Cashiers, and Retail Salespersons which lead the way in total openings. Home Health Aides, Helpers-Production Workers, and Personal Care Aides are projected to be the fastest growing Now occupations over the next decade.

**Next** jobs typically require a non-degree certificate, associate degree, apprenticeship, some experience, or moderate- to long-term training. Nursing Assistants, Cooks, and Food Preparation and Serving Worker Supervisors will have the most openings for the Next category of occupations. Veterinary Assistants, Medical Assistants, and Loan Interviewers and Clerks are the fastest growing Next occupations.

**Later** jobs typically require a bachelor's degree or higher. For Later occupations, Registered Nurses, General & Operations Managers, and Secondary School Teachers will have the most openings. Software Developers, Market Research Analysts, and Computer Systems Analysts are the fastest growing Later occupations.

#### **Central Region Fastest Growing Occupations**



★ DENOTES OCCUPATIONS TOP TEN ONLINE JOB ADS FOR 2018 IN THE REGION

AND WITHIN THE NOW-NEXT-LATER CLASSIFICATIONS

## **CENTRAL REGION**

#### Central Region Long-Term Occupational Projections by Top Openings

Occupation	2016 Estimated Employment	2026 Projected Employment	Growth Openings	Exits	Transfers	Total Openings	Median Wages
<b>●</b> NOW							
Combined Food Prep. & Serving Workers	7,516	9,804	2,288	7,668	8,020	17,976	\$19,023 ★
Cashiers	7,866	8,477	611	7,672	7,488	15,771	\$18,768 ★
Retail Salespersons	9,499	9,776	277	6,102	7,648	14,027	\$22,496 ★
Waiters & Waitresses	4,870	5,803	933	3,950	6,052	10,935	\$18,623
Secretaries & Administrative Assistants	8,878	8,692	-186	4,732	4,603	9,149	\$30,123
<b>○</b> NEXT							
Nursing Assistants	4,329	4,742	413	2,755	2,292	5,460	\$23,193 ★
Cooks, Restaurant	2,517	3,122	605	1,652	2,256	4,513	\$22,080 ★
Supervisors of Food Prep. & Serving Workers	2,459	2,996	537	1,222	2,602	4,361	\$25,917
Retail Sales First-Line Supervisors	3,545	3,846	301	1,364	2,487	4,152	\$35,102 ★
Bookkeeping, Accounting, & Auditing Clerks	2,985	3,071	86	1,875	1,455	3,416	\$31,714
<b>●</b> LATER							
Registered Nurses	6,755	7,671	916	2,065	1,568	4,549	\$60,523 ★
General & Operations Managers	4,277	4,926	649	954	2,745	4,348	\$70,632
Secondary School Teachers	4,573	4,970	397	1,462	1,780	3,639	\$42,569
Accountants & Auditors	2,085	2,376	291	658	1,283	2,232	\$50,564
Business Operations Specialists, All Other	2,048	2,232	184	671	1,235	2,090	\$53,942

SOURCE: MERIC OCCUPATIONAL PROJECTIONS 2016-2026

★ DENOTES OCCUPATIONS IN THE TOP TEN FOR 2018 ON-LINE JOB ADS IN THE REGION & WITHIN THE NOW-NEXT-LATER CLASSIFICATION



This workforce solution was funded by a grant awarded by the U.S. Department of Labor's Employment and Training Administration. The solution was created by the grantee and does not necessarily reflect the official position of the U.S. Department of Labor. The Department of Labor makes no guarantees, warranties, or assurances of any kind, express or implied, with respect to such information, including any information on linked sites and including, but not limited to, accuracy of the information or its completeness, timeliness, usefulness, adequacy, continued availability, or ownership.

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The Kansas City Region is comprised of five counties in the West Central part of Missouri. The region is home to several cities including Kansas City and Independence.

The Kansas City Region workforce has over 600,000 employees, making up 20.3 percent of Missouri's employment. In 2018, 50 percent of the workforce was female and 50 percent was male.

The workforce is getting older in the Kansas City Region, a trend happening throughout Missouri and the U.S. In 2018, 23 percent of the workforce was age 55 or older, up from 18 percent a decade earlier.

For the region, 20 percent of the workforce was non-white, compared to 17 percent for the state; 6 percent of the region's workforce was Hispanic or Latino, compared to 4 percent for Missouri

For 8 percent of the region's population (ages 18 to 64) the primary language spoken at home is something other than English. By comparison, Missouri was at 7 percent and the U.S. population at 23 percent.

The Kansas City Region has a lower percentage of the population with a disability compared to the state and nation. For the region, 11 percent of the population has a disability compared to 13 percent in Missouri and 10 percent in the U.S.

## 600,000 EMPLOYEES 20.3% OF MISSOURI'S EMPLOYMENT

#### **Workforce Demographics**

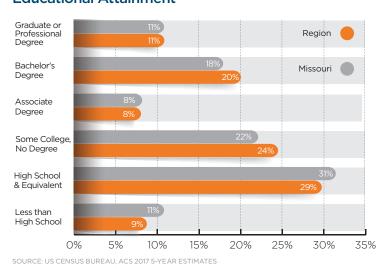
	K.C. Region	Missouri	Nationwide
Average monthly employment in 2018	600,294	2,954,808	155,761,000
Average Unemployment Rate in 2018	3.4%	3.2%	3.9%
Female	50%	51%	50%
Male	50%	49%	50%
Non-white	20%	17%	23%
Hispanic or Latino	6%	4%	15%
Ages 55 & older	23%	23%	23%
With disabilities (ages 18-64)	11%	13%	10%
Below Poverty Levels (ages 18-64)	12%	14%	14%
Language other than English (ages 18-6	54) 8%	7%	23%
Associate degree or higher (Age 25+)	38%	36%	39%

SOURCES: CENSUS ACS 2017-5YR EST.; BLS QCEW NOT-SEASONALLY ADJUSTED

Educational attainment rates for the Kansas City Region are slightly higher than those of the state in regards to bachelor's or advanced degrees. Thirty-eight percent of the region's population, age 25 and older, has an associate, bachelor's or advanced degree compared to 36 percent for the state.

The regional unemployment rate was 3.4 percent in 2018 overall, and as of May 2019, the preliminary rate stands at 3.1 percent, slightly down from 3.5 percent in May 2018. From May 2014 to May 2019, the unemployment rate dropped 3.2 points.

#### **Educational Attainment**

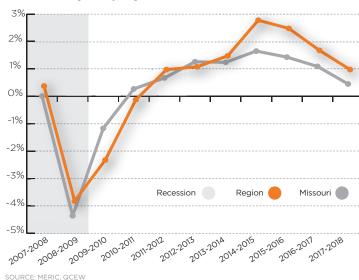


## KANSAS CITY REGION

#### **INDUSTRY ANALYSIS**

The Kansas City Region averaged an annualized 600,294 employees in 2018 and added 5,379 jobs from June 2017 to June 2018, growing 1.0 percent. Missouri employment increased by 0.4 percent in that time. From 2014 to 2018, the Kansas City Region averaged 1.5 percent annual growth for an overall increase of 8 percent; during that same period Missouri's employment grew 4.8 percent.

#### Kansas City Employment Annual Growth Rate



The Health Care and Social Assistance industry continues to lead the way in job growth for the region, showing consistent growth over the past four years, increasing over 9,000 jobs since 2013. Retail Trade added over 4,800 jobs from 2013 to 2018, an increase of 1.6 percent annually for the region.

Accommodation and Food Services grew by 2.5 percent annually, adding over 6,000 jobs; Professional, Scientific and Technical Services had the greatest gains since 2013, adding almost 14,000 jobs. Lastly, Manufacturing grew by 3.1 percent annually since 2013.

#### Kansas City Region Top Employing Industries

Industry	Empl 2013	oyment 2018	Net Change	2013-2018 Empl. CAGR	2018 Annual Wages
Health Care & Social Assistance	73,461	82,557	9,096	2.4%	\$48,996
Retail Trade	57,612	62,457	4,845	1.6%	\$27,708
Accommodations & Food Services	48,822	55,223	6,401	2.5%	\$18,180
Professional, Science & Tech. Servs.	40,595	54,561	13,966	6.1%	\$74,628
Manufacturing	37,693	44,009	6,316	3.1%	\$58,236
Educational Services	40,406	40,541	135	0.1%	\$46,560
Administrative & Support	26,409	32,012	5,603	3.9%	\$31,164
Construction	22,778	28,086	5,308	4.3%	\$58,428
Finance & Insurance	29,888	27,860	(2,028)	-1.4%	\$74,436
Wholesale Trade	23,819	24,524	705	0.6%	\$65,976

SOURCE: LEHD-QWI, 2013-2018 2ND QUARTER

#### **LOCATION QUOTIENT**

To understand the major industries within a region, an analysis of industry concentration or clustering can be useful. The Location Quotient (LQ) describes the concentration of an industry in a geographic region, in relation to the nation, with 1.0 being the national average. Industries higher than 1.0 indicate a concentration.

The Kansas City Region has higher concentrations in Data Processing and Hosting, Transportation Equipment Manufacturing, Scientific, Professional, and Technical Services, and Management of Companies to, just to name a few.

Large employers do not necessarily have a high LQ, though sometimes that is the case. Kansas City regions large employers includes the health care providers Children's Mercy Hospital, St. Luke's Hospital, North Kansas City Hospital, Truman Medical Center, and The Research Medical Center.

Technology companies, such as Cerner and DST Systems and manufacturers Ford and Honeywell, are in the region. Engineering firm Burns & McDonnell, pharmaceutical consulting Catalent, and Hallmark corporate headquarters, are in Kansas City. In addition, there is University of Missouri-Kansas City as a major public employer as well as the Federal Reserve Bank of Kansas City.



HIGHEST 2018
LQ 2.2
DATA PROCESSING

#### 2018 Kansas City Region Location Quotients

Industry	Employment	Location Quotient
Data Processing & Hosting	2,726	2.2
Transportation Equipment Manufacturing	12,151	1.9
Paper Manufacturing	2,241	1.6
Support Activities for Transportation	4,129	1.5
Professional & Technical Services	50,559	1.4
Performing Arts, Spectator Sports	2,685	1.4
Insurance Carriers & Related	11,966	1.4
Printing Support	2,134	1.3
Broadcasting (except internet)	1,312	1.3
Elec Markets, Agents, Brokers	2,582	1.3
Management of Companies	11,060	1.2
Gasoline Stations	4,239	1.2
Truck Transportation	6,768	1.2
Building Materials & Garden Supplies	5,807	1.2
SOURCE: MERIC, QCEW, 2018 ANNUAL AVERAGES		

## KANSAS CITY REGION

Projected growth in industry helps to identify future employment needs for an area. Projections indicate that the largest growth industries in the Kansas City Region will continue to be Professional, Scientific, and Technical Services, Accommodation and Food Services, Construction, Retail Trade, and the Finance and Insurance industry.



#### Kansas City Region Largest Growth Industries 2016-2026

Industry	Emplo 2016 Estimated	yment 2026 Projected	Cha 2016- Numeric	_
Professional, Scientific, & Tech. Services	44,779	56,547	11,768	26.28%
Accommodation & Food Services	53,609	58,660	5,051	9.42%
Construction	25,521	29,833	4,312	16.90%
Retail Trade	58,944	62,386	3,442	5.84%
Finance & Insurance	30,027	32,131	2,104	7.01%
Arts, Entertainment, & Recreation	10,324	12,239	1,915	18.55%
Local Government, Excluding Edu. & Hospitals	20,351	21,699	1,348	6.62%
Real Estate, Rental & Leasing	8,195	8,648	453	5.52%
Other Services	24,908	25,064	156	0.63%
Agriculture, Forestry, Fishing & Hunting	822	913	91	11.03%

SOURCES: MERIC INDUSTRY PROJECTIONS

#### PROJECTED GROWTH IN INDUSTRY HELPS TO IDENTIFY FUTURE EMPLOYMENT NEEDS FOR AN AREA.

#### **OCCUPATIONAL PROJECTIONS**

MERIC produces occupational projections that estimates labor demand over a 10-year period. MERIC categorizes these occupations using its Now-Next-Later method to help job seekers understand the training, education, and experience requirements for various occupations.

**Now** jobs typically require short-term on-the-job training, little to no experience, and/or a high school diploma. Now occupations include Combined Food Preparation and Serving Workers, Cashiers, and Retail Salespersons which lead the way in total openings. Health care related positions, including Home Health Aides and Personal Care Aides are projected to be the fastest growing Now occupations over the next decade.

**Next** jobs typically require a non-degree certificate, associate degree, apprenticeship, some experience, or moderateto long-term training. Heavy and Tractor-Trailer Truck Drivers, Cooks, and Nursing Assistants will have the most openings for the Next category of occupations. Structural Iron and Steel Workers and Heating, A.C., Refrigeration Mechanics are the fastest growing Next occupations.

**Later** jobs typically require a bachelor's degree or higher. For Later occupations, Registered Nurses, General and Operations Managers, and Accountants and Auditors will have the most openings. Software Developers and Information Security Analysts are the fastest growing Later occupations.

#### **Kansas City Region Fastest Growing Occupations**



★ DENOTES OCCUPATIONS TOP TEN ONLINE JOB ADS FOR 2018 IN THE REGION

AND WITHIN THE NOW-NEXT-LATER CLASSIFICATIONS

## KANSAS CITY REGION

#### Kansas City Region Long-Term Occupational Projections by Top Openings

Occupation	2016 Estimated Employment	2026 Projected Employment	Growth Openings	Exits	Transfers	Total Openings	Median Wages
● NOW							
Combined Food Prep. & Serving Workers	13,111	15,547	2,436	12,688	13,270	28,394	\$18,897 ★
Cashiers	13,555	14,124	569	12,994	12,681	26,244	\$20,281 ★
Retail Salespersons	16,191	16,574	383	10,372	13,001	23,756	\$22,183 ★
Waiters & Waitresses	11,092	11,993	901	8,544	13,090	22,535	\$19,706 ★
Personal Care Aides	7,553	10,493	2,940	7,201	5,425	15,566	\$21,932
● NEXT							
Heavy & Tractor-Trailer Truck Drivers	8,076	8,224	148	3,456	5,120	8,724	\$45,470 ★
Cooks, Restaurant	5,084	5,757	673	3,176	4,336	8,185	\$25,699 ★
Nursing Assistants	5,884	6,493	609	3,760	3,128	7,497	\$26,684 ★
Bookkeeping, Accounting, & Auditing Clerks	6,435	6,289	-146	3,939	3,057	6,850	\$39,310 ★
Supervisors of Food Prep. & Serving Workers	4,242	4,687	445	2,000	4,260	6,705	\$30,194
<b>●</b> LATER							
General & Operations Managers	9,829	10,847	1,018	2,143	6,167	9,328	\$85,029 ★
Registered Nurses	13,267	15,149	1,882	4,068	3,089	9,039	\$64,974 ★
Accountants & Auditors	7,403	8,294	891	2,317	4,516	7,724	\$61,984 ★
Software Developers, Applications	5,040	7,318	2,278	845	3,034	6,157	\$94,035 ★
Elementary School Teachers, Except Special Ed	u. 6,172	6,820	648	2,144	2,405	5,197	\$52,836

★ DENOTES OCCUPATIONS IN THE TOP TEN FOR 2018 ON-LINE JOB ADS IN THE REGION & WITHIN THE NOW-NEXT-LATER CLASSIFICATION



Workforce 2019 Report. All data in this report was current at the time of publication and is subject to revision. Additional details on data sources can be found in the full report.

This workforce solution was funded by a grant awarded by the U.S. Department of Labor's Employment and Training Administration. The solution was created by the grantee and does not necessarily reflect the official position of the U.S. Department of Labor. The Department of Labor makes no guarantees, warranties, or assurances of any kind, express or implied, with respect to such information, including any information on linked sites and including, but not limited to, accuracy of the information or its completeness, timeliness, usefulness, adequacy, continued availability, or ownership.



The Northeast Region is comprised of 16 counties in Northeastern Missouri. This region is home to several cities including Kirksville, Hannibal, Moberly, and Warrenton.

The Northeast Region workforce has over 124,000 employees, making up 4.2 percent of Missouri's employment. In 2018, 51 percent of the workforce was female and 49 percent was male.

The workforce is getting older in the Northeast Region, a trend happening throughout Missouri and the U.S. In 2018, 25 percent of the workforce was age 55 or older, up from 20 percent a decade earlier.

For the region, 7 percent of the workforce was non-white, compared to 17 for the state; 2 percent of the region's workforce was Hispanic or Latino, compared to 4 percent for Missouri.

For 3 percent of the region's population (ages 18 to 64) the primary language spoken at home is something other than English. By comparison, Missouri was at 7 percent and the U.S. population at 23 percent.

The Northeast Region has the same percentage of the population with a disability compared to the state and higher than the nation. For the region, 13 percent of the population has a disability compared to 13 percent in Missouri and 10 percent in the U.S.

## 124,000 EMPLOYEES 4.2% OF MISSOURI'S EMPLOYMENT

#### **Workforce Demographics**

	NE Region	Missouri	Nationwide
Average monthly employment in 2018	124,350	2,954,808	155,761,000
Average Unemployment Rate in 2018	3.2%	3.2%	3.9%
Female	51%	51%	50%
Male	49%	49%	50%
Non-white	7%	17%	23%
Hispanic or Latino	2%	4%	15%
Ages 55 & older	25%	23%	23%
With disabilities (ages 18-64)	13%	13%	10%
Below Poverty Levels (ages 18-64)	16%	14%	14%
Language other than English (ages 18-6	4) 8%	7%	23%
Associate degree or higher (Age 25+)	25%	36%	39%

SOURCES: CENSUS ACS 2017-5YR EST.; BLS QCEW NOT-SEASONALLY ADJUSTED

Educational attainment rates for the Northeast Region are lower than those of the state in regards to bachelor's or advanced degrees. Twenty-five percent of the region's population, age 25 and older, has an associate, bachelor's or advanced degree compared to 36 percent for the state.

The regional unemployment rate was 3.2 percent in 2018 overall, and as of May 2019, the preliminary rate stands at 3.1 up from 2.8 percent in May 2018. From May 2014 to May 2019, the unemployment rate dropped 2.7 points.

#### **Educational Attainment**



## NORTHEAST REGION

#### **INDUSTRY ANALYSIS**

The Northeast Region averaged an annualized 124,350 employees in 2018 and added 843 jobs from June 2017 to June 2018, growing 1.1 percent. Missouri employment increased by 0.4 percent in that time. From 2014 to 2018, the Northeast Region averaged 0.4 percent annual growth for an overall increase of 2.2 percent; during that same period Missouri's employment grew 4.8 percent.

#### **Northeast Employment Annual Growth Rate**



The Manufacturing industry continues to lead the way in job growth for the region, showing consistent growth over the past four years, increasing over 1,600 jobs since 2013. Health Care dropped slightly over 900 jobs from 2013 to 2018, but has maintained a workforce of over 12,000.

The Educational Services industry lost over 500 jobs since 2013; Accommodation and Food Services grew 0.8 percent annually adding nearly 250 new jobs in the past 5 years. Construction had an increase of over 780 jobs since 2013 and the Transportation sector added over 600 new jobs in the past 5 years, which is an annual growth of 4.8 percent.

#### Northeast Region Top Employing Industries

Industry	Emplo 2013	oyment 2018	Net Change	2013-2018 Empl. CAGR	2018 Annual Wages
Health Care & Social Assistance	13,020	12,115	(905)	-1.4%	\$33,648
1anufacturing	9,135	10,776	1,641	3.4%	\$46,704
Educational Services	10,351	9,773	(578)	-1.1%	\$43,176
Retail Trade	9,639	9,725	86	0.2%	\$22,776
Accommodation and Food Services	6,253	6,502	249	0.8%	\$12,792
Public Administration	4,637	4,571	(66)	-0.3%	\$32,988
Construction	3,681	4,463	782	3.9%	\$43,968
Wholesale Trade	3,239	3,317	78	0.5%	\$52,536
Fransportation and Warehousing	2,515	3,176	661	4.8%	\$39,468
Finance and Insurance	2,381	2,380	(1)	0.0%	\$42,816

SOURCE: LEHD-QWI, 2013-2018 2ND QUARTER

#### **LOCATION QUOTIENT**

To understand the major industries within a region, an analysis of industry concentration or clustering can be useful. The Location Quotient (LQ) describes the concentration of an industry in a geographic region, in relation to the nation, with 1.0 being the national average. Industries higher than 1.0 indicate a concentration.

The Northeast Region has higher concentrations in Manufacturing, Crop and Animal Production, Truck Transportation, and Nursing and Residential Care, just to name a few.

Large employers do not necessarily have a high LQ, though sometimes that is the case. The Northeast region's large employers includes Hannibal Regional Hospital, Moberly Regional Medical Center, and the Northeast Regional Medical Center.

Top employing Food Manufacturers include General Mills, Kraft Foods, and Con Agra Foods. Cerro Flow and Bodine Aluminum are major Metal Manufacturers. Watlow Electric is a major Machinery Manufacturer and Truman State University is a large public sector employer for the region.



#### 2018 Northeast Region Location Quotients

Industry		Employment	Location Quotient
Gasoline Sta	ations	1,806	4.0
Nonmetallic	Product Manufacturing	363	3.2
Crop Produc	ction	489	2.0
Animal Proc	luction	237	1.9
Truck Trans	portation	1,209	1.8
Nursing & R	esident Care	3,170	1.8
Building Ma	terials & Garden Supplies	1,149	1.7
Heavy & Civ	il Engineering	954	1.6
General Mer	chandise Stores	1,301	1.4
Credit Interr	mediation & Related Activities	1,813	1.4
Wood Produ	uct Manufacturing	216	1.4
Transportati	on Equipment Manufacturing	461	1.1
Repair & Ma	intenance	804	1.1
Merch Whol	esalers, nondurable goods	1,049	1.1
Motor Vehic	le Parts Dealers	1,047	1.1
SOURCE: MERIC, Q	CEW, 2018 ANNUAL AVERAGES		

## NORTHEAST REGION

Projected growth in industry helps to identify future employment needs for an area. Projections indicate that the largest growth industries in the Northeast Region will be the Health Care and Social Assistance industry, Retail Trade, Educational Services, and Transportation and Warehousing.



#### Northeast Region Largest Growth Industries 2016-2026

Industry	Emplo 2016 Estimated	yment 2026 Projected	Cha 2016- Numeric	•
Health Care & Social Assistance	10,934	12,123	1,189	10.87%
Retail Trade	11,354	12,158	804	7.08%
Educational Services	9,458	10,258	800	8.45%
Transportation & Warehousing	3,453	3,833	380	11.00%
Administration & Support	1,538	1,883	345	22.44%
Construction	3,809	4,060	251	6.59%
Agriculture, Forestry, Fishing & Hunting	1,472	1,667	195	13.25%
Wholesale Trade	3,008	3,147	139	4.63%
Other Services (except Government)	3,032	3,138	106	3.49%
Professional, Scientific, & Technical Services	1,655	1,721	66	4.00%

SOURCES: MERIC INDUSTRY PROJECTIONS

#### PROJECTED GROWTH IN INDUSTRY HELPS TO IDENTIFY FUTURE EMPLOYMENT NEEDS FOR AN AREA.

#### **OCCUPATIONAL PROJECTIONS**

MERIC produces occupational projections that estimates labor demand over a 10-year period. MERIC categorizes these occupations using its Now-Next-Later method to help job seekers understand the training, education, and experience requirements for various occupations.

**Now** jobs typically require short-term on-the-job training, little to no experience, and/or a high school diploma. Now occupations include Cashiers, Combined Food Preparation and Serving Workers, Waiters and Waitresses, and Retail Salespersons which lead the way in total openings. Other positions include Refuse and Recyclable Material Collectors, Packers and Packagers, and Personal Care Aides which are projected to be the fastest growing Now occupations over the next decade.

**Next** jobs typically require a non-degree certificate, associate degree, apprenticeship, some experience, or moderate-tolong-term training. Heavy and Tractor-Trailer Truck Drivers, Nursing Assistants, and Retail Sales Supervisors will have the most openings for the Next category of occupations. Pharmacy Technicians, Medical Assistants, and Medical Secretaries are the fastest growing Next occupations.

**Later** jobs typically require a bachelor's degree or higher. For Later occupations General & Operations Managers and Teachers will have the most openings. Market Research Analysts and Health Specialties Teachers are the fastest growing Later occupations.

#### **Northeast Region Fastest Growing Occupations**



NOTE: OCCUPATIONS WITH NET INCREASE OF LESS THAN 50 ARE OMITTED

 $\bigstar$  DENOTES OCCUPATIONS TOP TEN ONLINE JOB ADS FOR 2018 IN THE REGION

SOURCE: MERIC OCCUPATIONAL PROJECTIONS, 2016-2026

## NORTHEAST REGION

#### Northeast Region Long-Term Occupational Projections by Top Openings

Occupation	2016 Estimated Employment	2026 Projected Employment	Growth Openings	Exits	Transfers	Total Openings	Median Wages
NOW							
Cashiers	2,840	2,954	114	2,720	2,655	5,489	\$18,502 ★
Food Prep. & Serving Workers	1,647	1,777	130	1,516	1,585	3,231	\$18,741 ★
Waiters & Waitresses	1,687	1,665	-22	1,241	1,901	3,120	\$18,891
Retail Salespersons	1,965	2,024	59	1,263	1,583	2,905	\$21,765 ★
Secretaries & Administrative Assistants	2,899	2,679	-220	1,502	1,461	2,743	\$28,961
● NEXT							
Heavy & Tractor-Trailer Truck Drivers	2,097	2,234	137	918	1,360	2,415	\$39,265 ★
Nursing Assistants	1,304	1,293	-11	789	656	1,434	\$22,840 ★
Supervisors of Retail Sales Workers	1,131	1,207	76	431	787	1,294	\$33,320 ★
Bookkeeping, Accounting, & Auditing Clerks	989	971	-18	607	471	1,060	\$31,173
Cooks, Restaurant	577	598	21	344	470	835	\$19,480
<b>○</b> LATER							
General & Operations Managers	1,402	1,498	96	301	865	1,262	\$60,599 ★
Elementary School Teachers	1,350	1,467	117	465	521	1,103	\$44,731
Substitute Teachers	695	771	76	447	343	866	\$22,885
Secondary School Teachers	1,083	1,175	92	346	421	859	\$39,819
Farmers, Ranchers & Other Agricultural Mngt.	1,076	1,110	34	639	162	835	n/a

SOURCE: MERIC OCCUPATIONAL PROJECTIONS 2016-2026

★ DENOTES OCCUPATIONS IN THE TOP TEN FOR 2018 ON-LINE JOB ADS IN THE REGION & WITHIN THE NOW-NEXT-LATER CLASSIFICATION





data sources can be found in the full report.

This workforce solution was funded by a grant awarded by the U.S. Department of Labor's Employment and Training Administration. The solution was created by the grantee and does not necessarily reflect the official position of the U.S. Department of Labor. The Department of Labor makes no guarantees, warranties, or assurances of any kind, express or implied, with respect to such information, including any information on linked sites and including, but not limited to, accuracy of the information or its completeness, timeliness, usefulness, adequacy, continued availability, or ownership.



The Northwest Region is comprised of 18 counties in the Northwest Workforce Demographics corner of Missouri. The region is home to several cities including St. Joseph, Chillicothe, Trenton, and Maryville.

The Northwest Region workforce has over 123,500 employees, making up 4.2 percent of Missouri's employment. In 2018, 51 percent of the workforce was female and 49 percent was male.

The workforce is getting older in the Northwest Region, a trend happening throughout Missouri and the U.S. In 2018, 24 percent of the workforce was age 55 or older, up from 19 percent a decade

For the region, 8 percent of the workforce was non-white, compared to 17 percent for the state; 4 percent of the region's workforce was Hispanic or Latino, compared to 4 percent for Missouri.

For 5 percent of the region's population (ages 18 to 64) the primary language spoken at home is something other than English. By comparison, Missouri was at 7 percent and the U.S. population at 23 percent.

The Northwest Region has the same percentage of the population with a disability compared to the state and higher than the nation. For the region, 13 percent of the population has a disability compared to 13 percent in Missouri and 10 percent in the U.S.

## 123,500 **EMPLOYEES EMPLOYMENT**

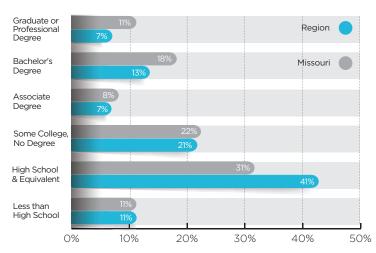
	NW Region	Missouri	Nationwide
Average monthly employment in 2018	123,550	2,954,808	155,761,000
Average Unemployment Rate in 2018	3.0%	3.2%	3.9%
Female	51%	51%	50%
Male	49%	49%	50%
Non-white	8%	17%	23%
Hispanic or Latino	4%	4%	15%
Ages 55 & older	24%	23%	23%
With disabilities (ages 18-64)	13%	13%	10%
Below Poverty Levels (ages 18-64)	15%	14%	14%
Language other than English (ages 18-6	4) 5%	7%	23%
Associate degree or higher (Age 25+)	27%	36%	39%

SOURCES: CENSUS ACS 2017-5YR EST.; BLS QCEW NOT-SEASONALLY ADJUSTED

Educational attainment rates for the Northwest Region are lower than those of the state in regards to bachelor's or advanced degrees. Twenty-seven percent of the region's population, age 25 and older, has an associate, bachelor's or advanced degree compared to 36 percent for the state.

The regional unemployment rate was 3.0 percent in 2018 overall, and as of May 2019, the preliminary rate stands at 2.9 percent, the same percentage from May 2018. From May 2014 to May 2019, the unemployment rate dropped 2.8 points.

#### **Educational Attainment**



SOURCE: US CENSUS BUREAU, ACS 2017 5-YEAR ESTIMATES

## NORTHWEST REGION

#### **INDUSTRY ANALYSIS**

The Northwest Region averaged an annualized 123,550 employees in 2018 and lost 479 jobs from June 2017 to June 2018, resulting in a -0.5 percent growth rate. Missouri employment increased by 0.4 percent in that time. From 2014 to 2018, the Northwest Region averaged 0.2 percent annual growth for an overall increase of 0.9 percent; during that same period Missouri's employment grew

#### Northwest Employment Annual Growth Rate



The Health Care industry added over 260 jobs from 2013 to 2018, growing at a modest 0.3 percent a year. Manufacturing lost 429 jobs, but continues to be the largest employing industry in the region and maintains a workforce of over 16,500.

The Retail industry grew by 675 jobs in the region since 2013. Educational Services and Construction both had modest gains. Lastly, Wholesale Trade grew by 427 jobs since 2013.

#### Northwest Region Top Employing Industries

Industry	Empl 2013	oyment 2018	Net Change	2013-2018 Empl. CAGR	2018 Annual Wages
Manufacturing	17,016	16,587	(429)	-0.5%	\$51,948
Health Care and Social Assistance	15,673	15,937	264	0.3%	\$41,928
Retail Trade	10,007	10,682	675	1.3%	\$24,552
Educational Services	9,396	9,445	49	0.1%	\$39,420
Accommodation and Food Services	7,572	6,875	(697)	-1.9%	\$13,272
Public Administration	5,875	5,694	(181)	-0.6%	\$32,832
Administrative and Support	4,447	4,053	(394)	-1.8%	\$24,504
Construction	3,680	3,852	172	0.9%	\$57,696
Wholesale Trade	3,268	3,695	427	2.5%	\$51,240
Finance and Insurance	3,274	3,228	(46)	-0.3%	\$51,168

SOURCE: LEHD-QWI, 2013-2018 2ND QUARTER

#### **LOCATION QUOTIENT**

To understand the major industries within a region, an analysis of industry concentration or clustering can be useful. The Location Quotient (LQ) describes the concentration of an industry in a geographic region, in relation to the nation, with 1.0 being the national average. Industries higher than 1.0 indicate a concentration.

The Northwest Region has higher concentrations in several manufacturing sectors including Food, Fabricated Metals, and Chemical Manufacturing; also Building Materials and Garden Supplies, Transit and Ground Passenger, and Merchandise Wholesalers, to name a few.

Large employers do not necessarily have a high LQ, though sometimes that is the case. The Northeast region's largest employers are in manufacturing and health care. Boehringer Ingelheim employs for Chemical Manufacturing, Triumph Foods and Smithfield Farmland employs for Food Manufacturing, Altec Industries provides Fabricated Metals Manufacturing, and Kawasaki Motors employs for Machinery Manufacturing.

The health care industry's larger employer for the region is Hartland Regional Medical Center. In addition, American Family Insurance, Northwest Missouri State University and Western Missouri Correctional Center are also the region's larger employers.



#### **2018 Northwest Region Location Quotients**

Industry	Employment	Location Quotient
Food Manufacturing	4,760	4.9
Fabricated Metal Manufacturing	2,910	3.3
Chemical Manufacturing	1,581	3.1
Gasoline Stations	1,697	3.0
Building Materials & Garden Supplies	1,280	1.6
Transit & Ground Passenger	427	1.5
Merch Wholesalers, nondurable goods	1,865	1.4
General Merchandise Stores	2,367	1.3
Utilities	413	1.2
Animal Production	190	1.2
Motor Vehicle Parts Dealers	1,406	1.2
Social Assistance	2,633	1.1
Nursing & Residential Care	2,274	1.1
Repair & Maintenance	856	1.1
SOURCE: MERIC, QCEW, 2018 ANNUAL AVERAGES		

## NORTHWEST REGION

Projected growth in industry helps to identify future employment needs for an area. Projections indicate that the largest growth industries in the Northwest Region will be the Manufacturing, and Health Care and Social Assistance industries.



#### Northwest Region Largest Growth Industries 2016-2026

Industry	Employ 2016 Estimated	yment 2026 Projected	Cha 2016- Numeric	•
Manufacturing	15,724	17,080	1,356	8.62%
Health Care & Social Assistance	14,421	15,428	1,007	6.98%
Administrative & Support	4,096	4,894	798	19.47%
Professional, Scientific, & Technical Services	2,152	2,489	337	15.66%
Transportation & Warehousing	3,187	3,385	198	6.20%
Agriculture, Forestry, Fishing & Hunting	1,777	1,919	142	7.99%
Wholesale Trade	3,332	3,471	139	4.17%
Construction	3,197	3,306	109	3.40%
Management of Companies	582	627	45	7.69%
Mining	143	155	12	8.07%

SOURCES: MERIC INDUSTRY PROJECTIONS

#### PROJECTED GROWTH IN INDUSTRY HELPS TO IDENTIFY FUTURE EMPLOYMENT NEEDS FOR AN AREA.

#### **OCCUPATIONAL PROJECTIONS**

MERIC produces occupational projections that estimates labor demand over a 10-year period. MERIC categorizes these occupations using its Now-Next-Later method to help job seekers understand the training, education, and experience requirements for various occupations.

**Now** jobs typically require short-term on-the-job training, little to no experience, and/or a high school diploma. Now occupations include Cashiers, Food Preparation and Serving Workers, and Retail Sales which lead the way in total openings. Helpers— Production Workers, Personal Care Aides, and Industrial Truck and Tractor Operators are projected to be the fastest growing Now occupations over the next decade.

**Next** jobs typically require a non-degree certificate, associate degree, apprenticeship, some experience, or moderate- to longterm training. Nursing Assistants, Heavy and Tractor-Trailer Truck Drivers, and First-line Supervisors of Retail Sales will have the most openings for the Next category of occupations. Industrial Machinery Mechanics, Insurance Sales Agents, and Computer-Controlled Machine Tool Operators are the fastest growing Next occupations.

**Later** jobs typically require a bachelor's degree or higher. For Later occupations Secondary School Teachers, Registered Nurses, and General & Operations Managers will have the most openings. Market Research Analysts, Finance Managers, and Mental Health Counselors are the fastest growing Later occupations.



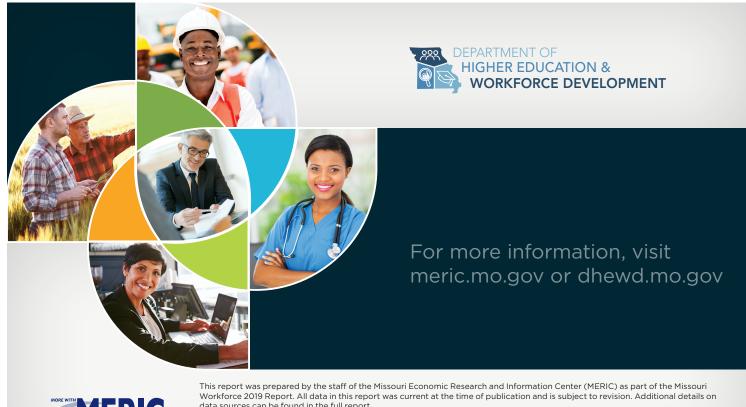
## NORTHWEST REGION

#### Northwest Region Long-Term Occupational Projections by Top Openings

Occupation	2016 Estimated Employment	2026 Projected Employment	Growth Openings	Exits	Transfers	Total Openings	Median Wages
● NOW							
Cashiers	3,556	3,465	-91	3,296	3,217	6,422	\$18,928
Food Preparation & Serving Workers	2,932	3,092	160	2,667	2,789	5,616	\$18,976
Retail Salespersons	2,752	2,793	41	1,755	2,200	3,996	\$22,659 ★
Laborers & Freight, Stock, & Material Movers	2,155	2,419	264	1,133	1,955	3,352	\$25,040 ★
Secretaries & Administrative Assistants	3,135	2,842	-293	1,610	1,566	2,883	\$27,823 ★
● NEXT							
Nursing Assistants	2,188	2,259	71	1,351	1,124	2,546	\$21,523
Heavy & Tractor-Trailer Truck Drivers	1,385	1,349	-36	580	859	1,403	\$38,148
Supervisors of Retail Sales Workers	1,109	1,136	27	414	755	1,196	\$36,237 ★
Bookkeeping, Accounting, & Auditing Clerks	1,073	1,034	-39	652	506	1,119	\$32,504 ★
Cooks, Restaurant	603	611	8	356	486	850	\$21,863 ★
<b>●</b> LATER							
Secondary School Teachers	2,063	2,060	-3	631	769	1,397	\$42,076 ★
Registered Nurses	2,195	2,406	211	659	500	1,370	\$58,606
General & Operations Managers	1,284	1,351	67	273	786	1,126	\$69,714
Elementary School Teachers	1,092	1,088	-4	360	404	760	\$39,530 ★
Middle School Teachers	780	778	-2	257	288	543	\$46,024 ★

SOURCE: MERIC OCCUPATIONAL PROJECTIONS 2016-2026

★ DENOTES OCCUPATIONS IN THE TOP TEN FOR 2018 ON-LINE JOB ADS IN THE REGION & WITHIN THE NOW-NEXT-LATER CLASSIFICATION



data sources can be found in the full report.

This workforce solution was funded by a grant awarded by the U.S. Department of Labor's Employment and Training Administration. The solution was created by the grantee and does not necessarily reflect the official position of the U.S. Department of Labor. The Department of Labor makes no guarantees, warranties, or assurances of any kind, express or implied, with respect to such information, including any information on linked sites and including, but not limited to, accuracy of the information or its completeness, timeliness, usefulness, adequacy, continued availability, or ownership.



The Ozark Region is comprised of seven counties in the Southwest quadrant of Missouri. This region is home to several cities including Springfield, Branson, Nixa, and Marshfield.

The Ozark Region workforce has over 262,600 employees, making up 8.9 percent of Missouri's employment. In 2018, 50 percent of the workforce was female and 50 percent was male.

The workforce is getting older in the Ozark Region, a trend happening throughout Missouri and the U.S. In 2018, 22 percent of the workforce was age 55 or older, up from 18 percent a decade earlier

For the region, 8 percent of the workforce was non-white, compared to 17 percent for the state; 4 percent of the region's workforce was Hispanic or Latino, matching the overall state average of 4 percent.

For 5 percent of the region's population (ages 18 to 64) the primary language spoken at home is something other than English. By comparison, Missouri was at 7 percent and the U.S. population at 23 percent.

The Ozark Region has a higher percentage of the population with a disability compared to the state and nation. For the Ozark Region, 14 percent of the population has a disability compared to 13 percent in Missouri and 10 percent in the U.S.

## 262,600 EMPLOYEES 8.9% OF MISSOURI'S EMPLOYMENT

#### **Workforce Demographics**

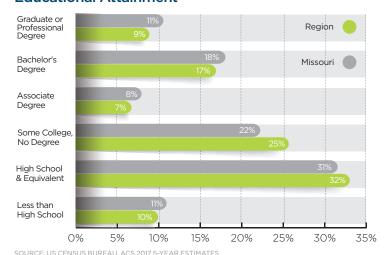
	Ozark MO	Missouri	Nationwide
Average monthly employment in 2018	262,653	2,954,808	155,761,000
Average Unemployment Rate in 2018	3.1%	3.2%	3.9%
Female	50%	51%	50%
Male	50%	49%	50%
Non-white	8%	17%	23%
Hispanic or Latino	4%	4%	15%
Ages 55 & older	22%	23%	23%
With disabilities (ages 18-64)	14%	13%	10%
Below Poverty Levels (ages 18-64)	17%	14%	14%
Language other than English (ages 18-64	4) 5%	7%	23%
Associate degree or higher (Age 25+)	33%	36%	39%

SOURCES: CENSUS ACS 2017-5YR EST.; BLS QCEW NOT-SEASONALLY ADJUSTED

Educational attainment rates for the Ozark Region are slightly behind those of the state in regards to bachelor's or advanced degrees. Thirty-three percent of the region's population, age 25 and older, has an associate, bachelor's or advanced degree compared to 36 percent for the state.

The regional unemployment rate was 3.1 percent in 2018 overall, and as of May 2019, the preliminary rate stands at 2.8 percent, slightly up from 2.6 percent in May 2018. From May 2014 to May 2019, the unemployment rate dropped 3.7 points.

#### **Educational Attainment**



## **OZARK REGION**

#### **INDUSTRY ANALYSIS**

The Ozark Region averaged an annualized 262,653 employees in 2018 and added 2,473 jobs from June 2017 to June 2018, growing 1.0 percent. Missouri employment increased by 0.4 percent in that time. From 2014 to 2018, the Ozark Region averaged 1.4 percent annual growth for an overall increase of 7 percent; during that same period Missouri's employment grew 4.8 percent.

#### **Ozark Employment Annual Growth Rate**



Health Care continues to be one of the largest employing industries in the region, showing consistent growth over the past five years, increasing 4,300 jobs since 2013. Retail Trade added slightly over 890 jobs. Accommodation and Food Services added over 3,300 jobs from 2013 to 2018, an increase of nearly 2.5 percent each year for the region.

The Manufacturing industry shows gains of 2.2 percent annually and Transportation industry's added over 2,100 jobs. One of the fastest growing industries in the Ozark Region is the Professional, Scientific & Technical Services industry, which gained 2,710 jobs from 2013 to 2018, with an overall growth rate of 6.1 percent.

#### **Ozark Region Top Employing Industries**

Industry	Emp 2013	loyment 2018	Net Change	2013-2018 Empl. CAGR	2018 Annual Wages
Health Care & Social Assistance	37,861	42,161	4,300	2.2%	\$45,036
Retail Trade	28,856	29,749	893	0.6%	\$26,580
Accommodation & Food Services	25,259	28,5943	,335	2.5%	\$17,508
Educational Services	20,774	21,306	532	0.5%	\$45,504
Manufacturing	14,900	16,593	1,693	2.2%	\$44,220
Administrative & Support	14,072	15,537	1,465	2.0%	\$29,328
Wholesale Trade	10,864	12,883	2,019	3.5%	\$62,880
Fransportation & Warehousing	9,741	11,897	2,156	4.1%	\$41,028
Construction	9,171	11,000	1,829	3.7%	\$42,288
Professional, Scientific & Tech. Srvs.	7,857	10,567	2,710	6.1%	\$51,720

SOURCE: LEHD-QWI, 2013-2018 2ND QUARTER

#### LOCATION QUOTIENT

To understand the major industries within a region, an analysis of industry concentration or clustering can be useful. The Location Quotient (LQ) describes the concentration of an industry in a geographic region, in relation to the nation, with 1.0 being the national average. Industries higher than 1.0 indicate a concentration.

The Ozark Region has higher concentrations in Truck Transportation, Performing Arts-Spectator Sports, Accommodation, Telecommunications, Sports, Hobby, Music and Book Stores, and Hospitals, just to name a few.

Large employers do not necessarily have a high LQ, though sometimes that is the case. The Ozark Region's largest employers includes health care providers CoxHealth and Mercy Hospital; New Prime, Inc. truck transportation; Kraft Food and Loren Cook manufacturers; and Jack Henry & Associates for the Professional, Scientific, and Technical Services industry. Chase Bank Cardservices, Hotels.com and T-Mobile call centers; Bass Pro Shops and O'Reilly Automotive corporate headquarters. Missouri State University is a major public sector employer in the region as is Ozarks Technical Community College.



#### 2018 Ozark Region Location Quotients

Industry	Employment	Location Quotient
Truck Transportation	7,824	3.1
Performing Arts, Spectator Sports	1,747	2.1
Accommodation	6,774	2.0
Telecommunications	2,340	1.9
Sports, Hobby, Music, Book Stores	1,777	1.9
Hospitals	15,112	1.8
Gasoline Stations	2,351	1.5
Merchandise Wholesalers, durable goods	7,229	1.4
General Merchandise Stores	7,023	1.4
Building Materials & Garden Supplies	2,909	1.3
Repair & Maintenance	2,660	1.2
Fabricated Metal Manufacturing	2,922	1.2
Credit Intermediation & Related Activities	5,207	1.2
Motor Vehicle Parts Dealers	3,971	1.2
Amusement, Gambling, Recreation	3,337	1.2
Nursing & Residential Care	6,507	1.2
SOURCE: MERIC, QCEW, 2018 ANNUAL AVERAGES		

QWI, 2013-2018 2ND QUARTER SOURCE: MERIC, QCEW, 2018 ANNUAL AVERAGE

## **OZARK REGION**

Projected growth in industry helps to identify future employment needs for an area. Projections indicate that the largest growth industries in the Ozark Region will be Health Care and Social Assistance, Retail Trade, Educational Services, Administrative and Support, and Professional, Scientific, and Technical Services.



#### Ozark Region Largest Growth Industries 2016-2026

Industry	Emplo 2016 Estimated	yment 2026 Projected	Cha 2016- Numeric	_
Health Care & Social Assistance	38,296	46,741	8,445	22.05%
Retail Trade	31,495	34,552	3,057	9.71%
Educational Services	19,596	22,477	2,881	14.70%
Administrative & Support	13,564	16,100	2,536	18.69%
Professional, Scientific, & Technical Services	8,908	11,356	2,448	27.48%
Local Government, Excluding Edu. & Hospitals	8,508	10,894	2,386	28.04%
Transportation & Warehousing	11,467	13,174	1,707	14.89%
Management of Companies	3,971	5,016	1,045	26.32%
Other Services (except Government)	10,004	10,872	868	8.68%
Finance & Insurance	8,931	9,626	695	7.78%

SOURCES: MERIC INDUSTRY PROJECTIONS

## PROJECTED GROWTH IN INDUSTRY HELPS TO IDENTIFY FUTURE EMPLOYMENT NEEDS FOR AN AREA.

#### **OCCUPATIONAL PROJECTIONS**

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**Now** jobs typically require short-term on-the-job training, little to no experience, and/or a high school diploma. Now occupations include Food Service Workers, Retail Salespersons, and Cashiers which lead the way in total openings. Home Health Aides, Personal Care Aides, and Food Preparation and Serving Workers are projected to be the fastest growing Now occupations over the next decade.

**Next** jobs typically require a non-degree certificate, associate degree, apprenticeship, some experience, or moderate- to long-term training. Heavy and Tractor-Trailer Truck Drivers, Nursing Assistants, and Cooks will have the most openings for the Next category of occupations. Plumbers, Pipefitters, and Steamfitters, Heating, A.C. and Refrigeration Mechanics, and Police and Sheriff's Patrol Officers are the fastest growing Next occupations.

**Later** jobs typically require a bachelor's degree or higher. For Later occupations, Registered Nurses, General & Operations Managers, and Secondary School Teachers will have the most openings. Software Developers, Financial Managers, and Market Research Analysts are the fastest growing Later occupations.

#### **Ozark Region Fastest Growing Occupations**



SOURCE: MERIC OCCUPATIONAL PROJECTIONS, 2016-2026

★ DENOTES OCCUPATIONS TOP TEN ONLINE JOB ADS FOR 2018 IN THE REGION

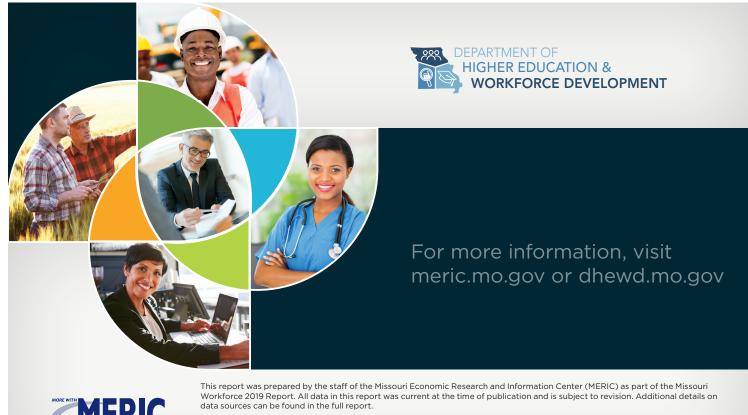
## **OZARK REGION**

#### Ozark Region Long-Term Occupational Projections by Top Openings

Occupation	2016 Estimated Employment	2026 Projected Employment	Growth Openings	Exits	Transfers	Total Openings	Median Wages
<b>●</b> Now							
Food Prep. & Serving Workers	7,753	9,613	1,860	7,689	8,041	17,590	\$18,893 ★
Retail Salespersons	9,195	10,215	1,020	6,144	7,702	14,866	\$22,200 ★
Cashiers	7,206	7,775	569	7,033	6,864	14,466	\$19,220 ★
Waiters & Waitresses	5,131	5,756	625	4,029	6,173	10,827	\$18,529
Customer Service Representatives	5,380	6,043	663	2,920	4,285	7,868	\$29,172 ★
● NEXT							
Heavy & Tractor-Trailer Truck Drivers	7,473	8,767	1,294	3,443	5,101	9,838	\$40,620 ★
Nursing Assistants	3,952	4,720	768	2,634	2,191	5,593	\$23,266 ★
Cooks, Restaurant	3,218	3,761	543	2,044	2,792	5,379	\$20,320 ★
Supervisors of Retail Sales Workers	3,141	3,494	353	1,224	2,232	3,809	\$38,044 ★
Bookkeeping & Accounting Clerks	2,659	2,845	186	1,704	1,322	3,212	\$32,272 ★
<b>●</b> LATER							
Registered Nurses	6,385	8,006	1,621	2,060	1,564	5,245	\$54,224 ★
General & Operations Managers	3,609	4,168	559	806	2,319	3,684	\$72,391 ★
Secondary School Teachers	2,375	2,736	361	783	953	2,097	\$46,174
Accountants & Auditors	1,433	1,727	294	466	909	1,669	\$54,024
Elementary School Teachers	1,738	2,001	263	617	692	1,572	\$54,929

SOURCE: MERIC OCCUPATIONAL PROJECTIONS 2016-2026

★ DENOTES OCCUPATIONS IN THE TOP TEN FOR 2018 ON-LINE JOB ADS IN THE REGION & WITHIN THE NOW-NEXT-LATER CLASSIFICATION



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The South Central Region is comprised of 12 counties in the center of the southern portion of Missouri. The region is home to several cities including West Plains and Poplar Bluff.

The South Central Region workforce has over 78,900 employees, making up 2.7 percent of Missouri's employment. In 2018, 55 percent of the workforce was female and 45 percent was male. The workforce is getting older in the South Central Region, a trend happening throughout Missouri and the U.S. In 2018, 24 percent of the workforce was age 55 or older, up from 18 percent a decade earlier.

For the region, 6 percent of the workforce was non-white, compared to 17 percent for the state; 2 percent of the region's workforce was Hispanic or Latino, compared to 4 percent for Missouri.

For 2 percent of the region's population (ages 18 to 64) the primary language spoken at home is something other than English. By comparison, Missouri was at 7 percent and the U.S. population at 23 percent.

The South Central Region has a higher percentage of the population with a disability compared to the state and the nation. For the South Central Region, 22 percent of the population has a disability compared to 13 percent in Missouri and 10 percent in the U.S.

## 78,900 EMPLOYEES 2.7% OF MISSOURI'S EMPLOYMENT

#### **Workforce Demographics**

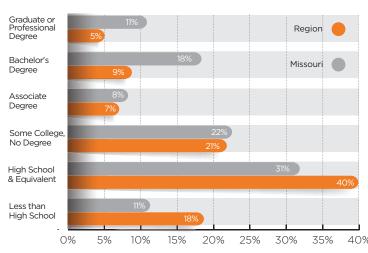
	SC Region	Missouri	Nationwide
Average monthly employment in 2018	78,937	2,954,808	155,761,000
Average Unemployment Rate in 2018	4.3%	3.2%	3.9%
Female	55%	51%	50%
Male	45%	49%	50%
Non-white	6%	17%	23%
Hispanic or Latino	2%	4%	15%
Ages 55 & older	24%	23%	23%
With disabilities (ages 18-64)	22%	13%	10%
Below Poverty Levels (ages 18-64)	22%	14%	14%
Language other than English (ages 18-6	4) 2%	7%	23%
Associate degree or higher (Age 25+)	21%	36%	39%

SOURCES: CENSUS ACS 2017-5YR EST.; BLS QCEW NOT-SEASONALLY ADJUSTED

Educational attainment rates for the South Central Region are lower than those of the state in regards to bachelor's or advanced degrees. Twenty-one percent of the region's population, age 25 and older, has an associate, bachelor's or advanced degree compared to 36 percent for the state.

The regional unemployment rate was 4.3 percent in 2018 overall, and as of May 2019, the preliminary rate stands at 4.6 percent, slightly up from 4.1 percent in May 2018. From May 2014 to May 2019, the unemployment rate dropped 3.0 points.

#### **Educational Attainment**



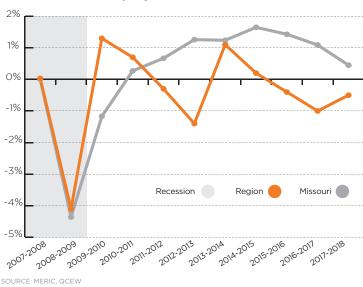
SOURCE: US CENSUS BUREAU, ACS 2017 5-YEAR ESTIMATES

## SOUTH CENTRAL REGION

#### **INDUSTRY ANALYSIS**

The South Central Region averaged an annualized 78,937 employees in 2018 and lost 299 jobs from June 2017 to June 2018, resulting in a -0.5 percent employment growth. Missouri employment increased by 0.4 percent in that time. From 2014 to 2018, the South Central Region averaged -0.3 percent annual growth for an overall decrease of 1.5 percent; during that same period Missouri's employment grew 4.8 percent.

#### South Central Employment Annual Growth Rate



Health Care and Social Services continues to be one of the largest employing industries in the region, even with some minor loss of -0.2 percent since 2013. Manufacturing is the second largest industry in the area at over 8,400 jobs.

The Retail Trade industry maintains a steady workforce of over 7,200 jobs. Accommodation and Food Services gained 283 jobs showing annual growth of 1.2 percent. The Wholesale Trade industry gained 265 jobs since 2013, increasing at an annualized 2.8 percent. Lastly, Finance and Insurance climbed nearly 200 jobs in the region for an annualized growth of 2.1 percent.

#### **South Central Region Top Employing Industries**

Industry	Empl 2013	oyment 2018	Net Change	2013-2018 Empl. CAGR	2018 Annual Wages
Health Care and Social Assistance	12,237	12,095	(142)	-0.2%	\$29,784
Manufacturing	9,581	8,475	(1,106)	-2.4%	\$32,676
Retail Trade	7,264	7,278	14	0.0%	\$23,280
Educational Services	6,472	6,325	(147)	-0.5%	\$37,416
Accommodation and Food Services	4,567	4,850	283	1.2%	\$12,828
Public Administration	2,935	2,911	(24)	-0.2%	\$30,324
Wholesale Trade	1,766	2,031	265	2.8%	\$48,228
Administrative and Support	2,073	1,883	(190)	-1.9%	\$19,332
Construction	1,795	1,805	10	0.1%	\$37,884
Finance and Insurance	1,605	1,784	179	2.1%	\$38,064

SOURCE: LEHD-QWI, 2013-2018 2ND QUARTER

#### LOCATION QUOTIENT

To understand the major industries within a region, an analysis of industry concentration or clustering can be useful. The Location Quotient (LQ) describes the concentration of an industry in a geographic region, in relation to the nation, with 1.0 being the national average. Industries higher than 1.0 indicate a concentration.

The South Central Region has higher concentrations in Wood Product Manufacturing, Gas Stations, Machinery Manufacturing, Forestry and Logging, and Social Assistance, just to name a few.

Large employers do not necessarily have a high LQ, though sometimes that is the case. The South Central Region's largest employers includes health care providers Poplar Bluff Regional Medical Center, Ozark Medical Center, Texas County Memorial Hospital and John J. Pershing VA Medical Hospital.

Manufacturers in the region include Briggs and Stratton, Gates Corporation, DRS Technologies, Libla Industries, and Armstrong Hardwood Flooring Company. Large public sector employers include South Central Correctional Center, Missouri State University-West Plains campus, and Three Rivers College.



#### 2018 South Central Region Location Quotients

Industry	Employment	Location Quotient
Wood Product Manufacturing	1,839	12.0
Gasoline Stations	1,165	3.3
Machinery Manufacturing	1,061	2.5
Forestry & Logging	50	2.5
Social Assistance	2,644	1.8
Building Materials & Garden Supplies	888	1.8
General Merchandise Stores	1,964	1.7
Nursing & Resident Care	2,041	1.6
Motor Vehicle Parts Dealers	1,129	1.5
Truck Transportation	830	1.5
Food & Beverage Stores	1,476	1.3
Credit Intermediation & Related Activities	1,224	1.2
Fabricated Metal Manufacturing	594	1.1
SOURCE: MERIC, QCEW, 2018 ANNUAL AVERAGES		

## SOUTH CENTRAL REGION

Projected growth in industry helps to identify future employment needs for an area. Projections indicate that the largest growth industries in the South Central Region will be Health Care and Social Assistance, Administrative and Support, Accommodation and Food Services, and Transportation and Warehousing—with Professional, Scientific and Technical Services growing at a greater percentage.



#### South Central Region Largest Growth Industries 2016-2026

Employment 2016 2026 Estimated Projected		2016 2026		Numeric	2026 Percent
1,694	13,462	1,768	15.12%		
2,148	2,919	771	35.91%		
5,087	5,476	389	7.65%		
2,160	2,411	251	11.60%		
1,834	2,048	214	11.67%		
3,630	8,821	191	2.22%		
1,367	1,553	186	13.59%		
1,306	1,390	84	6.39%		
1,039	1,105	66	6.35%		
1,952	2,006	54	2.74%		
5	1,694 2,148 5,087 2,160 1,834 8,630 1,367 1,306	1,694 13,462 2,148 2,919 5,087 5,476 2,160 2,411 1,834 2,048 8,630 8,821 1,367 1,553 1,306 1,390 1,039 1,105	imated         Projected         Numeric           1,694         13,462         1,768           2,148         2,919         771           5,087         5,476         389           2,160         2,411         251           1,834         2,048         214           3,630         8,821         191           1,367         1,553         186           1,306         1,390         84           1,039         1,105         66		

SOURCES: MERIC INDUSTRY PROJECTIONS

#### PROJECTED GROWTH IN INDUSTRY HELPS TO IDENTIFY FUTURE EMPLOYMENT NEEDS FOR AN AREA.

#### **OCCUPATIONAL PROJECTIONS**

MERIC produces occupational projections that estimates labor demand over a 10-year period. MERIC categorizes these occupations using its Now-Next-Later method to help job seekers understand the training, education, and experience requirements for various occupations.

**Now** typically require short-term on-the-job training, little to no experience, and/or a high school diploma. Now occupations include Food Service Workers, Cashiers, Personal Care Aides, and Retail Salespersons which lead the way in total openings. Helpers—Production Workers, Personal Care Aides, and Food Preparation and Serving Workers are projected to be the fastest growing Now occupations over the next decade.

**Next** jobs typically require a non-degree certificate, associate degree, apprenticeship, some experience, or moderate- to long-term training. Nursing Assistants, Heavy and Tractor-Trailer Truck Drivers, and Retail Sales Supervisors will have the most openings for the Next category of occupations. Medical Assistants, Pharmacy Technicians, and Machinists are the fastest growing Next occupations.

**Later** jobs typically require a bachelor's degree or higher. For Later occupations, Elementary School Teachers, Registered Nurses, and General & Operations Managers will have the most openings. Healthcare Social Workers, Loan Officers, and Medical and Health Service Managers are the fastest growing Later occupations.



## SOUTH CENTRAL REGION

#### South Central Region Long-Term Occupational Projections by Top Openings

Occupation	2016 Estimated Employment	2026 Projected Employment	Growth Openings	Exits	Transfers	Total Openings	Median Wages
Now							
Food Preparation & Serving Workers	2,057	2,373	316	1,961	2,051	4,328	\$18,320 ★
Cashiers	2,157	2,136	-21	2,015	1,967	3,961	\$18,925 ★
Personal Care Aides	2,012	2,642	630	1,857	1,399	3,886	\$19,453 ★
Retail Salespersons	2,013	2,086	73	1,298	1,626	2,997	\$24,053 ★
Helpers—Production Workers	1,103	1,582	479	720	1,278	2,477	\$21,196
● NEXT							
Nursing Assistants	1,406	1,558	152	900	749	1,801	\$19,666 ★
Heavy & Tractor-Trailer Truck Drivers	1,234	1,247	13	526	779	1,318	\$32,471
Retail Sales Supervisor	1,025	1,101	76	392	715	1,183	\$35,096 ★
Bookkeeping & Accounting Clerks	702	689	-13	431	334	752	\$28,516
Teacher Assistants	693	689	-4	379	315	690	\$19,873
<b>●</b> LATER							
Elementary School Teachers	1,716	1,688	-28	562	630	1,164	\$37,324
Registered Nurses	1,352	1,513	161	410	311	882	\$53,041 ★
General & Operations Managers	691	736	45	148	426	619	\$64,999
Child, Family, & School Social Workers	327	359	32	123	218	373	\$35,381
Middle School Teachers	529	520	-9	173	194	358	\$39,438

SOURCE: MERIC OCCUPATIONAL PROJECTIONS 2016-2026

★ DENOTES OCCUPATIONS IN THE TOP TEN FOR 2018 ON-LINE JOB ADS IN THE REGION & WITHIN THE NOW-NEXT-LATER CLASSIFICATION



This workforce solution was funded by a grant awarded by the U.S. Department of Labor's Employment and Training Administration. The solution was created by the grantee and does not necessarily reflect the official position of the U.S. Department of Labor. The Department of Labor makes no guarantees, warranties, or assurances of any kind, express or implied, with respect to such information, including any information on linked sites and including, but not limited to, accuracy of the information or its completeness, timeliness, usefulness, adequacy, continued availability, or ownership.



The Southeast Region is comprised of 13 counties in the southeast portion of Missouri. The region is home to several cities including Cape Girardeau, Sikeston, Caruthersville, and Park Hills.

The Southeast Region workforce has over 159,800 employees, making up 5.4 percent of Missouri's employment. In 2018, 53 percent of the workforce was female and 47 percent was male.

The workforce is getting older in the Southeast Region, a trend happening throughout Missouri and the U.S. In 2018, 23 percent of the workforce was age 55 or older, up from 19 percent a decade earlier.

For the region, 10 percent of the workforce was non-white, compared to 17 percent for the state; 2 percent of the region's workforce was Hispanic or Latino, compared to 4 percent for Missouri.

For 3 percent of the region's population (ages 18 to 64) the primary language spoken at home is something other than English. By comparison, Missouri was at 7 percent and the U.S. population at 23 percent.

The Southeast Region has a higher percentage of the population with a disability compared to the state and the nation. For the Southeast Region, 18 percent of the population has a disability compared to 13 percent in Missouri and 10 percent in the U.S.

## 159,800 EMPLOYEES 5.4% OF MISSOURI'S EMPLOYMENT

#### **Workforce Demographics**

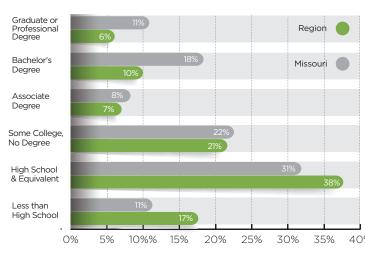
	SE Region	Missouri	Nationwide
Average monthly employment in 2018	159,885	2,954,808	155,761,000
Average Unemployment Rate in 2018	3.6%	3.2%	3.9%
Female	53%	51%	50%
Male	47%	49%	50%
Non-white	10%	17%	23%
Hispanic or Latino	2%	4%	15%
Ages 55 & older	23%	23%	23%
With disabilities (ages 18-64)	18%	13%	10%
Below Poverty Levels (ages 18-64)	19%	14%	14%
Language other than English (ages 18-64	4) 3%	7%	23%
Associate degree or higher (Age 25+)	23%	36%	39%

SOURCES: CENSUS ACS 2017-5YR EST.; BLS QCEW NOT-SEASONALLY ADJUSTED

Educational attainment rates for the Southeast Region are lower than those of the state in regards to bachelor's or advanced degrees. Twenty-three percent of the region's population, age 25 and older, has an associate, bachelor's or advanced degree compared to 36 percent for the state.

The regional unemployment rate was 3.6 percent in 2018 overall, and as of May 2019, the preliminary rate stands at 3.4 percent, slightly up from 3.3 percent in May 2018. From May 2014 to May 2019, the unemployment rate dropped 3.9 points.

#### **Educational Attainment**



SOURCE: US CENSUS BUREAU, ACS 2017 5-YEAR ESTIMATES

## **SOUTHEAST REGION**

#### **INDUSTRY ANALYSIS**

The Southeast Region averaged an annualized 159,885 employees in 2018 and gained 1,707 jobs from June 2017 to June 2018, resulting in a 1.2 percent employment growth. Missouri employment increased by 0.4 percent in that time. From 2014 to 2018, the Southeast Region averaged 0.1 percent annual growth for an overall decrease of 0.4 percent; during that same period Missouri's employment grew 4.8 percent

#### **Southeast Employment Annual Growth Rate**



Health Care and Social Assistance continues to be one of the largest employing industries in the region, from 2013 to 2018 there were 148 jobs added. Manufacturing is the second largest industry, though it lost over 800 jobs in the five-year period, it maintains a workforce of nearly 18,000.

Retail Trade added 590 jobs at an annualized growth rate of 0.7 percent. Educational Services grew by 211 jobs since 2013. Accommodation and Food Services had the largest job growth at 970 jobs from 2013 to 2018.

#### **Southeast Region Top Employing Industries**

				2013-2010	2010
	Emple	oyment	Net	Empl.	Annual
Industry	2013	2018	Change	CAGR	Wages
Health Care & Social Assistance	31,578	31,726	148	0.1%	\$34,584
Manufacturing	18,814	17,939	(875)	-0.9%	\$47,040
Retail Trade	16,002	16,592	590	0.7%	\$24,396
Educational Services	12,286	12,497	211	0.3%	\$43,836
Accommodation and Food Services	9,944	10,914	970	1.9%	\$13,872
Public Administration	6,805	6,778	(27)	-0.1%	\$31,800
Construction	6,086	6,360	274	0.9%	\$45,504
Wholesale Trade	6,225	5,942	(283)	-0.9%	\$47,520
Transportation and Warehousing	5,488	4,927	(561)	-2.1%	\$40,260
Administrative and Support	5,058	4,746	(312)	-1.3%	\$27,060

SOURCE: LEHD-QWI, 2013-2018 2ND QUARTER

#### **LOCATION QUOTIENT**

To understand the major industries within a region, an analysis of industry concentration or clustering can be useful. The Location Quotient (LQ) describes the concentration of an industry in a geographic region, in relation to the nation, with 1.0 being the national average. Industries higher than 1.0 indicate a concentration.

The Southeast Region has higher concentrations in Mining, Gas Stations, Crop Production, Wood Product Manufacturing, and Nonmetallic Product Manufacturing, just to name a few.

Large employers do not necessarily have a high LQ, though sometimes that is the case. The Southeast Region's largest employers includes health care providers St. Francis Medical Center, Southeast Missouri Hospital, and Missouri Delta Medical Center.

Food Manufacturers in the region include Good Humor-Breyers, Tyson Chicken, and Gilster-Mary Lee. Other manufacturers include W.W. Wood Products, US Tool Group, T.G. Missouri Corp, and Proctor & Gamble. Southeast Missouri State University is a large public sector employer in the region.



#### 2018 Southeast Region Location Quotients

Location

Industry	Employment	Quotient
Mining	1,006	5.7
Gasoline Stations	2,479	2.9
Crop Production	1,453	2.9
Wood Product Manufacturing	1,017	2.7
NonMetallic Product Manufacturing	802	2.1
Truck Transportation	2,803	2.0
Social Assistance	6,864	1.9
Nursing & Resident Care	5,588	1.8
Agricultural Support Activities	520	1.4
General Merchandise Stores	4,062	1.4
Health & Personal Care Stores	1,335	1.4
Building Materials & Garden Supplies	1,622	1.3
Motor Vehicle Parts Dealers	2,492	1.3
Electronic & Appliance Manufacturing	431	1.2
Merch. Wholesalers, nondurable goods	2,334	1.2
Broadcasting	267	1.1
SOURCE: MERIC, QCEW, 2018 ANNUAL AVERAGES		

## **SOUTHEAST REGION**

Projected growth in industry helps to identify future employment needs for an area. Projections indicate that the largest growth industries in the Southeast Region will be Health Care and Social Assistance, Administrative and Support, Accommodation and Food Services, Retail Trade, and Professional, Scientific and Technical Services.



#### Southeast Region Largest Growth Industries 2016-2026

Employ 2016 Estimated	yment 2026 Projected		•
29,487	35,831	6,344	21.51%
3,752	4,764	1,012	26.98%
11,172	11,791	619	5.54%
18,516	19,027	511	2.76%
2,795	3,190	395	14.12%
5,461	5,775	314	5.74%
11,684	11,890	206	1.76%
1,436	1,639	203	14.16%
5,550	5,717	167	3.00%
5,935	6,100	165	2.77%
	2016 Estimated  29,487  3,752  11,172  18,516  2,795  5,461  11,684  1,436  5,550	Estimated         Projected           29,487         35,831           3,752         4,764           11,172         11,791           18,516         19,027           2,795         3,190           5,461         5,775           11,684         11,890           1,436         1,639           5,550         5,717	2016 Estimated         2026 Projected         2016- Numeric           29,487         35,831         6,344           3,752         4,764         1,012           11,172         11,791         619           18,516         19,027         511           2,795         3,190         395           5,461         5,775         314           11,684         11,890         206           1,436         1,639         203           5,550         5,717         167

SOURCES: MERIC INDUSTRY PROJECTIONS

### PROJECTED GROWTH IN INDUSTRY HELPS TO IDENTIFY FUTURE EMPLOYMENT NEEDS FOR AN AREA.

#### **OCCUPATIONAL PROJECTIONS**

MERIC produces occupational projections that estimates labor demand over a 10-year period. MERIC categorizes these occupations using its Now-Next-Later method to help job seekers understand the training, education, and experience requirements for various occupations.

**Now** jobs typically require short-term on-the-job training, little to no experience, and/or a high school diploma. Now occupations include Personal Care Aides, Cashiers, and Food Preparation and Serving Workers which lead the way in total openings. Personal Care Aides, Home Health Aides, and Helpers-Production Workers are projected to be the fastest growing Now occupations over the next decade.

**Next** jobs typically require a non-degree certificate, associate degree, apprenticeship, some experience, or moderate- to long-term training. Heavy and Tractor-Trailer Truck Drivers, Nursing Assistants, and Retail Sales Supervisors will have the most openings for the Next category of occupations. Medical Assistants, Medical Secretaries, and Social and Human Service Assistants are the fastest growing Next occupations.

**Later** jobs typically require a bachelor's degree or higher. For Later occupations Registered Nurses, General & Operations Managers, and Secondary School Teachers will have the most openings. Physical Therapists, Healthcare Social Workers, and Market Research Analysts are the fastest growing Later occupations.

#### **Southeast Region Fastest Growing Occupations**



★ DENOTES OCCUPATIONS TOP TEN ONLINE JOB ADS FOR 2018 IN THE REGION

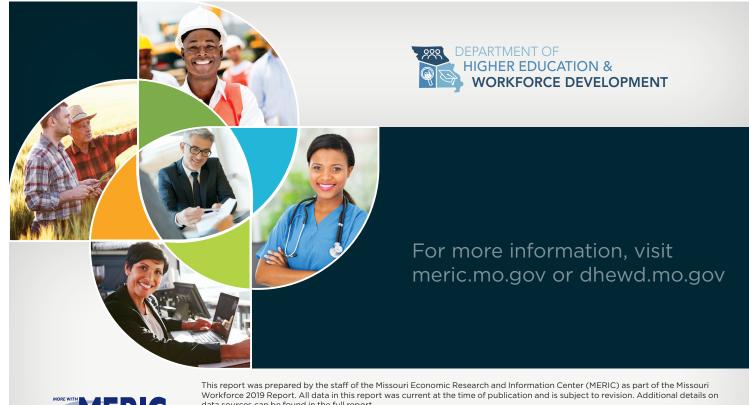
AND WITHIN THE NOW-NEXT-LATER CLASSIFICATIONS

## **SOUTHEAST REGION**

#### Southeast Region Long-Term Occupational Projections by Top Openings

Occupation	2016 Estimated Employment	2026 Projected Employment	Growth Openings	Exits	Transfers	Total Openings	Median Wages
Now							
Personal Care Aides	6,943	9,920	2,977	6,729	5,069	14,775	\$19,829
Cashiers	5,594	5,709	115	5,306	5,178	10,599	\$18,745 ★
Food Prep. & Serving Workers	4,106	4,642	536	3,873	4,051	8,460	\$18,417 ★
Retail Salespersons	4,325	4,393	68	2,760	3,459	6,287	\$22,901 ★
Secretaries & Administrative Assistants	4,589	4,189	-400	2,364	2,300	4,264	\$27,992
● NEXT							
Heavy & Tractor-Trailer Truck Drivers	3,707	3,700	-7	1,570	2,327	3,890	\$36,938 ★
Nursing Assistants	2,624	2,939	315	1,690	1,406	3,411	\$21,975 ★
Retail Sales Supervisor	1,923	2,003	80	725	1,321	2,126	\$34,317 ★
Cooks, Restaurant	1,370	1,465	95	831	1,134	2,060	\$20,110 ★
Bookkeeping & Accounting Clerks	1,752	1,705	-47	1,070	831	1,854	\$29,225
<b>●</b> LATER							
Registered Nurses	3,536	4,003	467	1,079	819	2,365	\$55,827 ★
General & Operations Managers	2,083	2,247	164	449	1,291	1,904	\$67,167 ★
Secondary School Teachers	2,373	2,437	64	737	897	1,698	\$45,651
Elementary School Teachers	1,027	1,055	28	344	385	757	\$45,126
Accountants & Auditors	719	804	85	225	438	748	\$52,119

★ DENOTES OCCUPATIONS IN THE TOP TEN FOR 2018 ON-LINE JOB ADS IN THE REGION & WITHIN THE NOW-NEXT-LATER CLASSIFICATION





data sources can be found in the full report.

This workforce solution was funded by a grant awarded by the U.S. Department of Labor's Employment and Training Administration. The solution was created by the grantee and does not necessarily reflect the official position of the U.S. Department of Labor. The Department of Labor makes no guarantees, warranties, or assurances of any kind, express or implied, with respect to such information, including any information on linked sites and including, but not limited to, accuracy of the information or its completeness, timeliness, usefulness, adequacy, continued availability, or ownership.



The Southwest Region is comprised of seven counties in the southwest corner of Missouri. This region is home to several cities including Joplin, Neosho, and Monett.

The Southwest Region workforce has over 132,800 employees, making up 4.5 percent of Missouri's employment. In 2018, 48 percent of the workforce was female and 52 percent was male.

The workforce is getting older in the Southwest Region, a trend happening throughout Missouri and the U.S. In 2018, 23 percent of the workforce was age 55 or older, up from 18 percent a decade earlier.

For the region, 9 percent of the workforce was non-white, compared to 17 percent for the state; 8 percent of the region's workforce was Hispanic or Latino, compared to 4 percent for Missouri.

For 8 percent of the region's population (ages 18 to 64) the primary language spoken at home is something other than English. By comparison, Missouri was at 7 percent and the U.S. population at 23 percent.

The Southwest Region has a higher percentage of the population with a disability compared to the state and the nation. For the Southwest Region, 14 percent of the population has a disability compared to 13 percent in Missouri and 10 percent in the U.S.

## 132,800 EMPLOYEES 4.5% OF MISSOURI'S EMPLOYMENT

#### **Workforce Demographics**

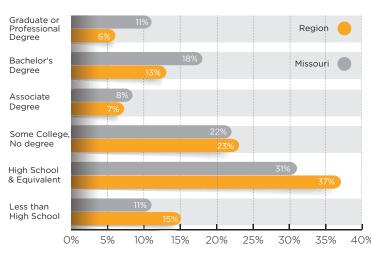
	SW Region	Missouri	Nationwide
Average monthly employment in 2018	132,845	2,954,808	155,761,000
Average Unemployment Rate in 2018	2.9%	3.2%	3.9%
Female	48%	51%	50%
Male	52%	49%	50%
Non-white	9%	17%	23%
Hispanic or Latino	8%	4%	15%
Ages 55 & older	23%	23%	23%
With disabilities (ages 18-64)	14%	13%	10%
Below Poverty Levels (ages 18-64)	16%	14%	14%
Language other than English (ages 18-6	4) 8%	7%	23%
Associate degree or higher (Age 25+)	26%	36%	39%

SOURCES: CENSUS ACS 2017-5YR EST.; BLS QCEW NOT-SEASONALLY ADJUSTED

Educational attainment rates for the Southwest Region are lower than those of the state in regards to bachelor's or advanced degrees. Twenty-six percent of the region's population, age 25 and older, has an associate, bachelor's or advanced degree compared to 36 percent for the state.

The regional unemployment rate was 2.9 percent in 2018 overall, and as of May 2019, the preliminary rate stands at 3.0 percent, up from 2.6 percent in May 2018. From May 2014 to May 2019, the unemployment rate dropped 2.8 points.

#### **Educational Attainment**



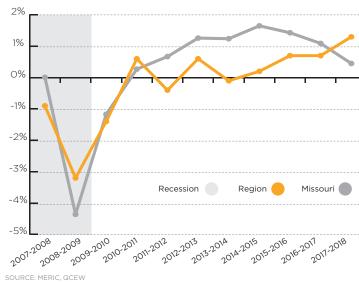
SOURCE: US CENSUS BUREAU, ACS 2017 5-YEAR ESTIMATES

## **SOUTHWEST REGION**

#### **INDUSTRY ANALYSIS**

The Southwest Region averaged an annualized 132,845 employees in 2018 and gained 1,497 jobs from June 2017 to June 2018, resulting in a 1.3 percent employment growth. Missouri employment increased by 0.4 percent in that time. From 2014 to 2018, the Southwest Region averaged 0.5 percent annual growth for an overall increase of 2.7 percent; during that same period Missouri's employment grew 4.8 percent.

#### **Southwest Employment Annual Growth Rate**



Manufacturing continues to be one of the largest employing industries in the region at over 23,900 jobs and growing 0.3 percent annually. Health Care and Social Assistance is the second largest industry in the area at over 16,100 jobs. Retail Trade added 661 new jobs since 2013 and is growing at an annualized 1.0 percent.

Educational Services added 263 new jobs between 2013 and 2018. Accommodation and Food Services added 429 jobs in the region. Professional and Technical Services industry continues to grow at an annualized 4.2 percent. Lastly, Construction continues to climb adding 798 new jobs since 2013.

#### **Southwest Region Top Employing Industries**

Emple 2013	oyment 2018	Net Change	2013-2018 Empl. CAGR	2018 Annual Wages
23,581	23,911	330	0.3%	\$42,756
16,603	16,136	(467)	-0.6%	\$42,648
13,181	13,842	661	1.0%	\$25,476
10,529	10,792	263	0.5%	\$44,736
8,362	8,791	429	1.0%	\$13,704
6,847	6,784	(63)	-0.2%	\$42,528
4,170	4,968	798	3.6%	\$41,364
5,131	4,822	(309)	-1.2%	\$22,632
4,513	4,103	(410)	-1.9%	\$45,744
3,091	3,795	704	4.2%	\$49,296
	2013 23,581 16,603 13,181 10,529 8,362 6,847 4,170 5,131 4,513	23,581 23,911 16,603 16,136 13,181 13,842 10,529 10,792 8,362 8,791 6,847 6,784 4,170 4,968 5,131 4,822 4,513 4,103	2013         2018         Change           23,581         23,911         330           16,603         16,136         (467)           13,181         13,842         661           10,529         10,792         263           8,362         8,791         429           6,847         6,784         (63)           4,170         4,968         798           5,131         4,822         (309)           4,513         4,103         (410)	Employment 2013         Net Change 2018         Empl. CAGR           23,581         23,911         330         0.3%           16,603         16,136         (467)         -0.6%           13,181         13,842         661         1.0%           10,529         10,792         263         0.5%           8,362         8,791         429         1.0%           6,847         6,784         (63)         -0.2%           4,170         4,968         798         3.6%           5,131         4,822         (309)         -1.2%           4,513         4,103         (410)         -1.9%

SOURCE: LEHD-QWI, 2013-2018 2ND QUARTER

#### LOCATION QUOTIENT

To understand the major industries within a region, an analysis of industry concentration or clustering can be useful. The Location Quotient (LQ) describes the concentration of an industry in a geographic region, in relation to the nation, with 1.0 being the national average. Industries higher than 1.0 indicate a concentration.

The Southwest Region has higher concentrations in Food Manufacturing, Truck Transportation, Electronic and Appliance Manufacturing, Animal Production, and Fabricated Metal Manufacturing, just to name a few.

Large employers do not necessarily have a high LQ, though sometimes that is the case. The Southwest Region's largest employers includes health care providers Freeman Health System and Mercy Hospital.

There are several manufacturers in the region. Food Manufacturing includes Tyson Food, Simmons Foods, George's Processing, and Butterball. Other manufacturers include EFCO Corp, La-Z-Boy, and Leggett & Platt.

Jack Henry & Associates is a large employer in the Professional, Scientific, and Technical industry. Missouri Southern State University is a major public sector employer in the region.



#### **2018 Southwest Region Location Quotients**

Industry	Employment	Location Quotient
Food Manufacturing	9,781	7.7
Truck Transportation	4,985	4.2
Electronic & Appliance Manufacturing	1,108	3.5
Animal Production	706	3.4
Fabricated Metal Manufacturing	3,558	3.1
Gasoline Stations	1,862	2.5
General Merchandise Stores	3,858	1.6
Wood Product Manufacturing	469	1.5
Utilities	630	1.4
Building Materials & Garden Supplies	1,442	1.4
Motor Vehicle Parts Dealers	2,149	1.3
Furniture Product Manufacturing	415	1.3
Warehousing & Storage	1,104	1.2
SOURCE: MERIC, QCEW, 2018 ANNUAL AVERAGES		

## SOUTHWEST REGION

Projected growth in industry helps to identify future employment needs for an area. Projections indicate that the largest growth industries in the Southwest Region will be Health Care and Social Assistance, Administrative and Support, Educational Services, Manufacturing, and Construction.



#### Southwest Region Largest Growth Industries 2016-2026

Industry	Employ 2016 Estimated	yment 2026 Projected	Cha 2016- Numeric	•
Health Care & Social Assistance	15,406	16,645	1,239	8.04%
Administrative & Support	5,418	6,526	1,108	20.46%
Educational Services	9,348	10,312	964	10.32%
Manufacturing	22,369	23,218	849	3.79%
Construction	3,926	4,553	627	15.98%
Retail Trade	15,257	15,589	332	2.18%
Other Services (except Government)	4,133	4,431	298	7.21%
Local Government, Excluding Edu. & Hospitals	3,930	4,177	247	6.29%
Agriculture, Forestry, Fishing & Hunting	1,750	1,930	180	10.26%
Wholesale Trade	4,013	4,151	138	3.43%

SOURCES: MERIC INDUSTRY PROJECTIONS

## PROJECTED GROWTH IN INDUSTRY HELPS TO IDENTIFY FUTURE EMPLOYMENT NEEDS FOR AN AREA.

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**Now** jobs typically require short-term on-the-job training, little to no experience, and/or a high school diploma. Now occupations include Cashiers, Food Preparation and Serving Workers, and Retail Salespersons which lead the way in total openings. Home Health Aides, Personal Care Aides, and Janitors and Cleaners, Except Maids and Housekeepers are projected to be the fastest growing Now occupations over the next decade.

**Next** jobs typically require a non-degree certificate, associate degree, apprenticeship, some experience, or moderate- to long-term training. Heavy and Tractor-Trailer Truck Drivers, Retail Sales Supervisors, and Nursing Assistants will have the most openings for the Next category of occupations. Computer User Support Specialists, Heating, A.C., and Refrigeration Mechanics, and Electricians are the fastest growing Next occupations.

**Later** jobs typically require a bachelor's degree or higher. For Later occupations Registered Nurses, General & Operations Managers, and Elementary and Secondary School Teachers will have the most openings. Software Developers, Computer Occupations, All Other, and Financial Managers are the fastest growing Later occupations.

#### **Southwest Region Fastest Growing Occupations**



Home Health Aides
Personal Care Aides ★
Janitors & Cleaners, except Maids/Housekpr ★
Meat, Poultry, Fish Cutters & Trimmers
Landscaping & Groundskeeping Workers



Computer User Support Specialists
Heating A.C. & Refrigeration Mechanics
Electricians
Computer-Controlled Machine Tool Oper.

Food Batchmakers



Software Developers, Applications
Computer Occupations, All Other ★
Financial Managers ★
Market Research Analysts & Specialists
Nurse Practitioners

NOTE: OCCUPATIONS WITH NET INCREASE OF LESS THAN 50 ARE OMITTED SOURCE: MERIC OCCUPATIONAL PROJECTIONS, 2016-2026

★ DENOTES OCCUPATIONS TOP TEN ONLINE JOB ADS FOR 2018 IN THE REGION AND WITHIN THE NOW-NEXT-LATER CLASSIFICATIONS

## SOUTHWEST REGION

#### Southwest Region Long-Term Occupational Projections by Top Openings

Occupation	2016 Estimated Employment	2026 Projected Employment	Growth Openings	Exits	Transfers	Total Openings	Median Wages
● Now							
Cashiers	3,702	3,609	-93	3,432	3,350	6,689	\$18,663
Food Prep. & Serving Workers	3,206	3,482	276	2,961	3,097	6,334	\$18,662 ★
Retail Salespersons	3,810	3,990	180	2,469	3,095	5,744	\$21,962 ★
Laborers & Material Movers	2,829	3,148	319	1,481	2,555	4,355	\$25,196 ★
Personal Care Aides	1,679	2,178	499	1,539	1,159	3,197	\$18,846 ★
<b>NEXT</b>							
Heavy & Tractor-Trailer Truck Drivers	5,295	5,174	-121	2,219	3,288	5,386	\$39,007 ★
Retail Sales Supervisor	1,694	1,762	68	638	1,163	1,869	\$36,890 ★
Nursing Assistants	1,461	1,487	26	895	745	1,666	\$22,820
Bookkeeping & Accounting Clerks	1,247	1,278	31	782	607	1,420	\$30,328
Supervisors of Food Prep. & Serving Workers	897	915	18	406	864	1,288	\$26,222
<b>O</b> LATER							
Registered Nurses	2,715	2,863	148	798	606	1,552	\$54,057
General & Operations Managers	1,432	1,562	130	310	893	1,333	\$68,003 ★
Elementary School Teachers	1,327	1,476	149	462	519	1,130	\$45,380
Secondary School Teachers	1,241	1,379	138	401	489	1,028	\$44,139
Middle School Teachers	854	951	97	298	334	729	\$44,142

OURCE: MERIC OCCUPATIONAL PROJECTIONS 2016-2026

★ DENOTES OCCUPATIONS IN THE TOP TEN FOR 2018 ON-LINE JOB ADS IN THE REGION & WITHIN THE NOW-NEXT-LATER CLASSIFICATION



This workforce solution was funded by a grant awarded by the U.S. Department of Labor's Employment and Training Administration. The solution was created by the grantee and does not necessarily reflect the official position of the U.S. Department of Labor. The Department of Labor makes no guarantees, warranties, or assurances of any kind, express or implied, with respect to such information, including any information on linked sites and including, but not limited to, accuracy of the information or its completeness, timeliness, usefulness, adequacy, continued availability, or ownership.



The St. Louis Region is comprised of five counties and is located in the east central part of Missouri. The region is home to several cities including Arnold, Washington, St. Charles, St. Peters, Florissant, O'Fallon, Chesterfield, and the City of St. Louis.

The St. Louis Region workforce has over 1,036,000 employees, making up 35.1 percent of Missouri's employment. In 2018, 51 percent of the workforce was female and 49 percent was male.

The workforce is getting older in the St. Louis Region, a trend happening throughout Missouri and the U.S. In 2018, 24 percent of the workforce was age 55 or older, up from 18 percent a decade earlier.

For the region, 23 percent of the workforce was non-white, compared to 17 percent for the state; 3 percent of the region's workforce was Hispanic or Latino, compared to 4 percent for Missouri.

For 8 percent of the region's population (ages 18 to 64) the primary language spoken at home is something other than English. By comparison, Missouri was at 7 percent and the U.S. population at 23 percent.

The St. Louis Region has a lower percentage of the population with a disability compared to the state, but evenly matched to the nation. For the St. Louis Region, 10 percent of the population has a disability compared to 13 percent in Missouri and 10 percent in the U.S.



#### **Workforce Demographics**

	St. Louis MO	Missouri	Nationwide
Average monthly employment in 2018	1,036,697	2,954,808	155,761,000
Average Unemployment Rate in 2018	3.0%	3.2%	3.9%
Female	51%	51%	50%
Male	49%	49%	50%
Non-white	23%	17%	23%
Hispanic or Latino	3%	4%	15%
Ages 55 & older	24%	23%	23%
With disabilities (ages 18-64)	10%	13%	10%
Below Poverty Levels (ages 18-64)	11%	14%	14%
Language other than English (ages 18-6	64) 8%	7%	23%
Associate degree or higher (Age 25+)	45%	36%	39%

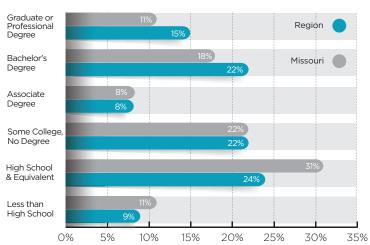
SOURCES: CENSUS ACS 2017-5YR EST.; BLS QCEW NOT-SEASONALLY ADJUSTED

Educational attainment rates for the St. Louis Region are greater than those of the state in regards to bachelor's or advanced degrees. Forty-five percent of the region's population, age 25 and older, has an associate, bachelor's or advanced degree compared to 36 percent for the state.

The regional unemployment rate was 3.0 percent in 2018 overall, and as of May 2019, the preliminary rate stands at 2.9 percent, slightly up from 2.8 percent in May 2018. From May 2014 to May 2019, the unemployment rate dropped 3.3 points.

#### **Educational Attainment**

SOURCE: US CENSUS BUREAU, ACS 2017 5-YEAR ESTIMATES

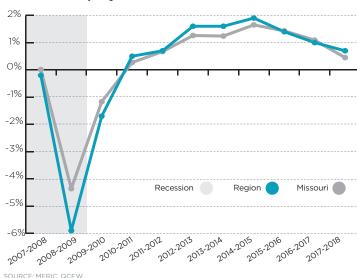


ST. LOUIS REGION

#### **INDUSTRY ANALYSIS**

The St. Louis Region averaged an annualized 1,036,697 employees in 2018 and added 7,577 jobs from June 2017 to June 2018, growing 0.7 percent. Missouri employment increased by 0.4 percent in that time. From 2014 to 2018, the St. Louis Region averaged 1.0 percent annual growth for an overall increase of 5.2 percent; during that same period Missouri's employment grew 4.8 percent.

#### St. Louis Employment Annual Growth Rate



Health Care continues to be one of the largest employing industries in the region, showing consistent growth from 2013 to 2018, increasing over 23,600 jobs since 2013. Retail Trade is the second largest industry adding over 5,900 jobs. Accommodation and Food Services added over 7,900 jobs, an increase of nearly 1.6 percent each year for the region.

Manufacturing continues to grow at an annualized 1.5 percent. Administrative and Support grew by over 6,600 jobs. Educational Services maintains steady employment. Lastly, The Professional and Technical Services industry gained over 7,400 jobs.

#### St. Louis Region Top Employing Industries

Industry	Emp	loyment 2018	Net Change	2013-2018 Empl. CAGR	2018 Annual Wages
Health Care & Social Assistance	157,123	180,773	23,650	2.8%	\$45,432
Retail Trade	105,248	111,191	5,943	1.1%	\$29,748
Accommodation & Food Services	94,502	102,458	7,956	1.6%	\$18,684
Manufacturing	85,789	92,376	6,587	1.5%	\$66,108
Administrative & Support	76,176	82,803	6,627	1.7%	\$37,980
Educational Services	81,572	81,610	38	0.0%	\$53,628
Professional, Scientific & Tech. Srvc	63,434	70,889	7,455	2.2%	\$80,244
Finance & Insurance	61,137	64,151	3,014	1.0%	\$84,588
Wholesale Trade	54,153	53,416	(737)	-0.3%	\$70,980
Construction	49,166	53,156	3,990	1.6%	\$59,748

SOURCE: LEHD-QWI, 2013-2018 2ND QUARTER

#### **LOCATION QUOTIENT**

To understand the major industries within a region, an analysis of industry concentration or clustering can be useful. The Location Quotient (LQ) describes the concentration of an industry in a geographic region, in relation to the nation, with 1.0 being the national average. Industries higher than 1.0 indicate a concentration.

The St. Louis Region has higher concentrations in Data Processing, Management of Companies, Chemical Manufacturing, Beverage & Tobacco Manufacturing and Hospitals, just to name a few.

Large employers do not necessarily have a high LQ, though sometimes that is the case. The St. Louis Region's largest employers includes health care providers Barnes-Jewish Hospital, SSM-St. Mary's Hospital, Mercy Hospital system, St. Luke's Hospital.

Other large employers include Anheuser-Bush, Enterprise, General Motors, Boeing, Nestle Purina, Edward Jones, and Wells Fargo all ranked among the top employers in their respective industry sectors. St. Louis University, Washington University, and the University of Missouri—St. Louis are also major public sector employers in the region.



HIGHEST 2018
LQ 2.4
DATA PROCESSING

#### 2018 St. Louis Region Location Quotients

Industry	Employment	Location Quotient
Data Processing & Hosting	6,256	2.4
Management of Companies	40,123	2.2
Chemical Manufacturing	11,458	1.8
Beverage & Tobacco Manufacturing	3,597	1.7
Hospitals	63,161	1.6
Securities, Commodities, Investments	11,098	1.5
Broadcasting (except internet)	3,043	1.5
Printing Support	4,818	1.5
Telecommunications	8,337	1.4
Machinery Manufacturing	12,147	1.4
Lessor of Nonfinancial Assets	245	1.4
Social Assistance	36,946	1.2
Educational Services	26,642	1.2
Insurance Carriers & Related	21,310	1.2
Merch. Wholesalers, durable goods	28,641	1.2
NonStore Retailers	5,158	1.2
SOURCE: MERIC, QCEW, 2018 ANNUAL AVERAGES		

## ST. LOUIS REGION

SOURCES: MERIC INDUSTRY PROJECTIONS

Projected growth in industry helps to identify future employment needs for an area. Projections indicate that the largest growth industries in the St. Louis Region will be Health Care and Social Assistance, Accommodation and Food Services, Administrative and Support, Educational Services, and Professional, Scientific, and Technical Services.



#### St. Louis Region Largest Growth Industries 2016-2026

Emplo 2016 Estimated	yment 2026 Projected	Cha 2016- Numeric	•
172,682	203,183	30,501	17.66%
99,417	108,558	9,141	9.19%
66,984	75,189	8,205	12.25%
80,141	86,770	6,629	8.27%
63,425	69,480	6,055	9.55%
57,744	63,182	5,438	9.42%
36,986	38,294	1,308	3.54%
51,263	52,469	1,206	2.35%
39,461	40,430	969	2.46%
109,754	110,681	927	0.84%
	2016 Estimated 172,682 99,417 66,984 80,141 63,425 57,744 36,986 51,263 39,461	Estimated         Projected           172,682         203,183           99,417         108,558           66,984         75,189           80,141         86,770           63,425         69,480           57,744         63,182           36,986         38,294           51,263         52,469           39,461         40,430	2016 Estimated         2026 Projected         2016- Numeric           172,682         203,183         30,501           99,417         108,558         9,141           66,984         75,189         8,205           80,141         86,770         6,629           63,425         69,480         6,055           57,744         63,182         5,438           36,986         38,294         1,308           51,263         52,469         1,206           39,461         40,430         969

PROJECTED GROWTH IN INDUSTRY HELPS TO IDENTIFY FUTURE EMPLOYMENT NEEDS FOR AN AREA.

#### **OCCUPATIONAL PROJECTIONS**

MERIC produces occupational projections that estimates labor demand over a 10-year period. MERIC categorizes these occupations using its Now-Next-Later method to help job seekers understand the training, education, and experience requirements for various occupations.

**Now** jobs typically require short-term on-the-job training, little to no experience, and/or a high school diploma. Now occupations include Food Preparation and Serving Workers, Cashiers, and Retail Salespersons which lead the way in total openings. Personal Care Aides, Home Health Aides, and Helpers—Production Workers are projected to be the fastest growing Now occupations over the next decade.

**Next** jobs typically require a non-degree certificate, associate degree, apprenticeship, some experience, or moderate- to long-term training. Nursing Assistants, Cooks, and Bookkeeping & Accounting Clerks will have the most openings for the Next category of occupations. Respiratory Therapists, Physical Therapist Assistants, and Phlebotomists are the fastest growing Next occupations.

**Later** jobs typically require a bachelor's degree or higher. For Later occupations, Registered Nurses, General & Operations Managers, and Accountants and Auditors will have the most openings. Information Security Analysts, Nurse Practitioners, and Statisticians are the fastest growing Later occupations.

#### St. Louis Region Fastest Growing Occupations



SOURCE: MERIC OCCUPATIONAL PROJECTIONS, 2016-2026

ND WITHIN THE NOW-NEXT-LATER CLASSIFICATIONS

★ DENOTES OCCUPATIONS TOP TEN ONLINE JOB ADS FOR 2018 IN THE REGION

## ST. LOUIS REGION

#### St. Louis Region Long-Term Occupational Projections by Top Openings

	2016 Estimated	2026 Projected	Growth			Total	Median
Occupation	Employment	Employment	Openings	Exits	Transfers	Openings	Wages
● NOW							
Food Prep. & Serving Workers	28,387	32,764	4,377	27,075	28,316	59,768	\$18,865 ★
Cashiers	24,607	24,451	-156	23,030	22,476	45,350	\$21,120
Retail Salespersons	30,188	29,238	-950	18,811	23,580	41,441	\$23,184 ★
Waiters & Waitresses	21,079	21,877	798	15,898	24,358	41,054	\$19,041 ★
Personal Care Aides	19,093	26,401	7,308	18,154	13,675	39,137	\$22,219
● NEXT							
Nursing Assistants	15,869	18,244	2,375	10,362	8,620	21,357	\$25,695 ★
Cooks, Restaurant	11,171	12,163	992	6,836	9,334	17,162	\$23,651
Bookkeeping & Accounting Clerks	12,879	12,437	-442	7,838	6,082	13,478	\$39,553 ★
Supervisors of Food Prep. & Serving Workers	8,689	9,364	675	4,044	8,612	13,331	\$28,875
Retail Sales Supervisor	11,152	11,308	156	4,145	7,557	11,858	\$40,8804 ★
<b>●</b> LATER							
Registered Nurses	33,616	39,328	5,712	10,442	7,929	24,083	\$62,749 ★
General & Operations Managers	16,754	18,003	1,249	3,603	10,366	15,218	\$104,336
Accountants & Auditors	11,693	12,539	846	3,577	6,972	11,395	\$70,133 ★
Elementary School Teachers	8,780	9,449	669	3,008	3,374	7,051	\$52,527
Business Operations Specialists	7,041	7,534	493	2,286	4,204	6,983	\$71,729

SOURCE: MERIC OCCUPATIONAL PROJECTIONS 2016-2026

★ DENOTES OCCUPATIONS IN THE TOP TEN FOR 2018 ON-LINE JOB ADS IN THE REGION & WITHIN THE NOW-NEXT-LATER CLASSIFICATION



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The West Central Region is comprised of 13 counties in the west central part of Missouri. This region is home to cities including Warrensburg, Sedalia, Lexington, Clinton, and Nevada.

The West Central Region workforce has 122,800 employees, making up 4.2 percent of Missouri's employment. In 2018, 54 percent of the workforce was female and 46 percent was male.

The workforce is getting older in the West Central Region, a trend happening throughout Missouri and the U.S. In 2018, 25 percent of the workforce was age 55 or older, up from 20 percent a decade earlier.

For the region, 7 percent of the workforce was non-white, compared to 17 percent for the state; 5 percent of the region's workforce was Hispanic or Latino, compared to 4 percent for Missouri.

For 5 percent of the region's population ages (18 to 64) the primary language spoken at home is something other than English. By comparison, Missouri was at 7 percent and the U.S. population at 23 percent.

The West Central Region has a higher percentage of the population with a disability compared to the state and the nation. For the West Central Region, 16 percent of the population has a disability compared to 13 percent in Missouri and 10 percent in the U.S.

## **122,800 EMPLOYEES EMPLOYMENT**

#### **Workforce Demographics**

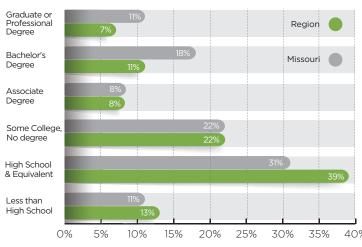
	WC Region	Missouri	Nationwide
Average monthly employment in 2018	122,800	2,954,808	155,761,000
Average Unemployment Rate in 2018	3.6%	3.2%	3.9%
Female	54%	51%	50%
Male	46%	49%	50%
Non-white	7%	17%	23%
Hispanic or Latino	5%	4%	15%
Ages 55 & older	25%	23%	23%
With disabilities (ages 18-64)	16%	13%	10%
Below Poverty Levels (ages 18-64)	17%	14%	14%
Language other than English (ages 18-6	4) 5%	7%	23%
Associate degree or higher (Age 25+)	26%	36%	39%

SOURCES: CENSUS ACS 2017-5YR EST.; BLS QCEW NOT-SEASONALLY ADJUSTED

Educational attainment rates for the West Central Region are lower than those of the state in regards to bachelor's or advanced degrees. Twenty-six percent of the region's population, age 25 and older, has an associate, bachelor's or advanced degree compared to 36 percent for the state.

The regional unemployment rate was 3.6 percent in 2018 overall, and as of May 2019, the preliminary rate stands at 3.4 percent, slightly up from 3.2 percent in May 2018. From May 2014 to May 2019, the unemployment rate dropped 3.0 points.

#### **Educational Attainment**



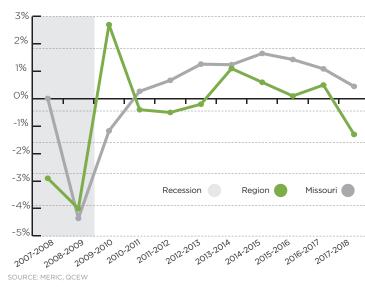
SOURCE: US CENSUS BUREAU, ACS 2017 5-YEAR ESTIMATES

## WEST CENTRAL REGION

#### **INDUSTRY ANALYSIS**

The West Central Region averaged an annualized 122,800 employees in 2018. The region lost 1,076 jobs from June 2017 to June 2018, resulting in a -1.3 percent employment growth. Missouri employment increased by 0.4 percent in that time. From 2014 to 2018, the West Central Region averaged 0.1 percent annual growth for an overall increase of 0.4 percent; during that same period Missouri's employment grew 4.8 percent.

#### **West Central Employment Annual Growth Rate**



The Health Care and Social Assistance industry continues to be one of the largest employing industries in the region with over 16,400 jobs. Manufacturing is the second largest industry in the area at slightly over 12,100 jobs and an annual growth rate of 1.1 percent. Educational Services is the third largest industry at over 10,700 jobs.

Retail Trade lost a little over 100 jobs, but maintains a workforce over 10,000 in the region. Administrative and Support Services, and the Professional, Scientific, and Technical Services industries have the highest annualize percent growth at 9.1 percent and 9.3 percent, respectively.

#### **West Central Region Top Employing Industries**

Industry	Emple 2013	oyment 2018	Net Change	2013-2018 Empl. CAGR	2018 Annual Wages
Health Care & Social Assistance	16,397	16,448	51	0.1%	\$32,304
Manufacturing	11,468	12,130	662	1.1%	\$42,828
Educational Services	11,187	10,702	(485)	-0.9%	\$44,484
Retail Trade	10,215	10,096	(119)	-0.2%	\$24,492
Accommodation & Food Services	6,639	7,331	692	2.0%	\$12,840
Public Administration	3,749	3,813	64	0.3%	\$25,740
Construction	3,400	3,283	(117)	-0.7%	\$39,840
Administrative & Support	1,868	2,883	1,015	9.1%	\$25,656
Wholesale Trade	2,706	2,793	87	0.6%	\$51,672
Professional, Scientific & Tech. Srvcs	1,756	2,733	977	9.3%	\$43,476

SOURCE: LEHD-QWI, 2013-2018 2ND QUARTEI

#### **LOCATION QUOTIENT**

To understand the major industries within a region, an analysis of industry concentration or clustering can be useful. The Location Quotient (LQ) describes the concentration of an industry in a geographic region, in relation to the nation, with 1.0 being the national average. Industries higher than 1.0 indicate a concentration.

The West Central Region has higher concentrations in Gasoline Stations, Animal Production, Food Manufacturing, Nursing and Resident Care, and Fabricated Metal Manufacturing, just to name a few.

Large employers do not necessarily have a high LQ, though sometimes that is the case. The West Central Region's largest employers includes health care providers Bothwell Regional Health Center, Fitzgibbon Hospital, Golden Valley Memorial, and Western Missouri Medical Center.

The West Central region has several manufacturers including Tyson Foods, ConAgra Foods, Enersys Energy Products, Maxion Wheels, 3M Company, and Waterloo Industries.

Public sector employers in this region include Whiteman Air Force Base, University of Central Missouri, and State Fair Community College.



#### **2018 West Central Region Location Quotients**

Industry	Employment	Location Quotient
Gasoline Stations	1,771	3.8
Animal Production	329	2.5
Food Manufacturing	1,748	2.2
Nursing & Resident Care	3,393	2.0
Fabricated Metal Manufacturing	1,466	2.0
Agricultural Support Activities	387	2.0
Machinery Manufacturing	1,100	2.0
Building Materials & Garden Supplies	1,101	1.7
Motor Vehicle Parts Dealers	1,613	1.6
Social Assistance	2,924	1.5
Credit Intermediation & Related Activities	1,933	1.5
General Merchandise Stores	2,108	1.4
Merch. Wholesalers, nondurable goods	1,426	1.3
SOURCE: MERIC, QCEW, 2018 ANNUAL AVERAGES		

## WEST CENTRAL REGION

Projected growth in industry helps to identify future employment needs for an area. Projections indicate that the largest growth industries in the West Central Region will be Health Care and Social Assistance, Retail Trade, Educational Services, Local Government, and Manufacturing.



#### West Central Region Largest Growth Industries 2016-2026

Emplo 2016 Estimated	yment 2026 Projected	Cha 2016- Numeric	_
13,862	15,136	1,274	9.19%
11,144	11,826	682	6.12%
10,366	10,969	603	5.81%
5,199	5,715	516	9.93%
11,535	11,939	404	3.50%
2,796	3,065	269	9.62%
1,703	1,906	203	11.90%
2,380	2,560	180	7.55%
2,778	2,954	176	6.33%
2,171	2,205	34	1.57%
	2016 Estimated 13,862 11,144 10,366 5,199 11,535 2,796 1,703 2,380 2,778	Estimated         Projected           13,862         15,136           11,144         11,826           10,366         10,969           5,199         5,715           11,535         11,939           2,796         3,065           1,703         1,906           2,380         2,560           2,778         2,954	2016 Estimated         2026 Projected         2016- Numeric           13,862         15,136         1,274           11,144         11,826         682           10,366         10,969         603           5,199         5,715         516           11,535         11,939         404           2,796         3,065         269           1,703         1,906         203           2,380         2,560         180           2,778         2,954         176

PROJECTED GROWTH IN INDUSTRY HELPS TO IDENTIFY FUTURE EMPLOYMENT NEEDS FOR AN AREA.

#### **OCCUPATIONAL PROJECTIONS**

MERIC produces occupational projections that estimates labor demand over a 10-year period. MERIC categorizes these occupations using its Now-Next-Later method to help job seekers understand the training, education, and experience requirements for various occupations.

**Now** jobs typically require short-term on-the-job training, little to no experience, and/or a high school diploma. Now occupations include Cashiers, Food Preparation and Serving Workers, and Personal Care Aides which lead the way in total openings. Personal Care Aides, Bus Drivers, and Light Truck or Delivery Service Drivers are projected to be the fastest growing Now occupations over the next decade.

**Next** jobs typically require a non-degree certificate, associate degree, apprenticeship, some experience, or moderate- to longterm training. Nursing Assistants, Heavy and Tractor-Trailer Truck Drivers, and Retail Sales Supervisors will have the most openings for the Next category of occupations. Welders, Cutters, Solderers, and Brazers, Insurance Sales Agents, and Pharmacy Technicians are the fastest growing Next occupations.

**Later** jobs typically require a bachelor's degree or higher. For Later occupations Elementary and Secondary School Teachers, General and Operations Managers, and Registered Nurses will have the most openings. Coaches and Scouts, Financial Managers, and Mental Health and Substance Abuse Social Workers are the fastest growing Later occupations.

#### **West Central Region Fastest Growing Occupations**



🛨 DENOTES OCCUPATIONS TOP TEN ONLINE JOB ADS FOR 2018 IN THE REGION

WITHIN THE NOW-NEXT-LATER CLASSIFICATIONS

## WEST CENTRAL REGION

#### West Central Region Long-Term Occupational Projections by Top Openings

Occupation	2016 Estimated Employment	2026 Projected Employment	Growth Openings	Exits	Transfers	Total Openings	Median Wages
● NOW							
Cashiers	3,217	3,493	276	3,150	3,074	6,500	\$18,540 ★
Food Prep. & Serving Workers	2,395	2,588	193	2,206	2,307	4,706	\$18,264 ★
Personal Care Aides	2,263	2,857	594	2,043	1,539	4,176	\$20,532 ★
Retail Salespersons	2,228	2,311	83	1,437	1,801	3,321	\$21,956 ★
Secretaries & Admin. Assistants	3,013	2,779	-234	1,560	1,518	2,844	\$28,456
● NEXT							
Nursing Assistants	2,098	2,220	122	1,312	1,091	2,525	\$20,110 ★
Heavy & Tractor-Trailer Truck Drivers	1,397	1,416	19	596	884	1,499	\$34,464 ★
Retail Sales Supervisor	1,254	1,345	91	480	874	1,445	\$35,310 ★
Bookkeeping & Accounting Clerks	889	838	-51	535	415	899	\$30,276
Cooks, Restaurant	591	611	20	352	481	853	\$20,785
<b>○</b> LATER							
Elementary School Teachers	1,320	1,409	89	450	505	1,044	\$42,286
Secondary School Teachers	1,238	1,319	81	392	477	950	\$45,482
General & Operations Managers	1,006	1,095	89	218	627	934	\$61,657
Registered Nurses	1,483	1,629	146	445	338	929	\$55,707 ★
Education Administrators, K12	591	634	43	172	279	494	\$93,619

★ DENOTES OCCUPATIONS IN THE TOP TEN FOR 2018 ON-LINE JOB ADS IN THE REGION & WITHIN THE NOW-NEXT-LATER CLASSIFICATION



data sources can be found in the full report.

This workforce solution was funded by a grant awarded by the U.S. Department of Labor's Employment and Training Administration. The solution was created by the grantee and does not necessarily reflect the official position of the U.S. Department of Labor. The Department of Labor makes no guarantees, warranties, or assurances of any kind, express or implied, with respect to such information, including any information on linked sites and including, but not limited to, accuracy of the information or its completeness, timeliness, usefulness, adequacy, continued availability, or ownership.



Missouri has just over 200,000 payroll employers who provide jobs for 2.7 million people. Approximately 2.2 million of those jobs are in metro areas, while the remaining work in non-metro locations. Metropolitan areas, such as Kansas City, St. Louis, Joplin, Springfield, Cape Girardeau, etc., are spread across Missouri. These areas represent larger urban cities and adjacent counties with strong commuting ties. Non-metro and metropolitan areas are more broadly connected, tying together producers and consumers that are vital to the state and nation's economy. This 2019 survey looked at both metro and non-metro employers to understand key similarities or differences that may help inform workforce or economic development decisions.

Over 1,600 Missouri companies, with five employees or more, were surveyed in April through June of 2019 to gauge the state of the workforce from the employers' point of view. Companies interviewed were randomly selected from a categorized list of Missouri businesses from the ReferenceUSA employer database. One-half were employers in a metro area and one-half were nonmetro employers. Companies were asked 14 questions about hiring trends, skill needs and shortages, and experience and education requirements. The table shows the number of businesses surveyed to represent the industry mix found in Missouri.

Nearly half (48%) of surveyed companies had 11-49 employees. Non-metro areas had a larger percentage of small employers surveyed, while 20 percent of metro companies surveyed employed 50 people or more.

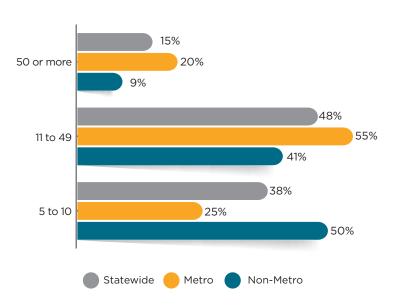
## PAYROLL EMPLOYERS PROVIDE JOBS FOR 2.7 MILLION PEOPLE IN MISSOURI

#### **Businesses Surveyed**

NAICS Code	Industry Description	# of Businesses Surveyed
11	Agriculture, Forestry, Fishing and Hunting	25
23	Construction	140
31-33	Manufacturing	66
42	Wholesale Trade	70
44-45	Retail Trade	229
48-49	Transportation and Warehousing	40
51	Information	33
52	Finance and Insurance	116
53	Real Estate and Rental and Leasing	77
54	Professional and Technical Services	132
56	Administrative and Waste Services	63
61	Educational Services	12
62	Health Care and Social Assistance	252
71	Arts, Entertainment, and Recreation	44
72	Accommodation and Food Services	124
81	Other Services	136
	Other Small Sectors*	98
Total		1,657

OTHER SMALL SECTORS WITH LESS THAN 1% OF ESTABLISHMENTS: NAICS 21 MINING, QUARRYING, AND OI
AND GAS EXTRACTION MAICS 22 LITH LITES MAICS 55 MANAGEMENT OF COMPANIES AND ENTERPRISES.

#### **Employment Size of Firms Surveyed**

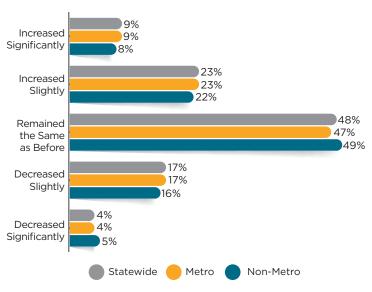


## **EMPLOYER SURVEY**

#### **HIRING TRENDS**

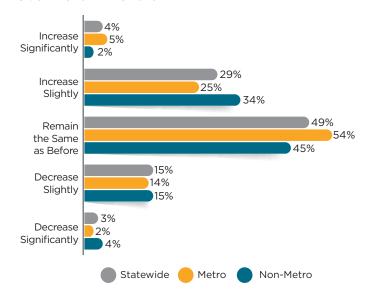
When asked about hiring trends over the last year, nearly one-half of employers in both metro and non-metro areas stated employment levels remained the same. Nearly one-third (32%) of employers across the state increased employment levels. Roughly one in five businesses had employment declines.

#### Change in Employment Levels Over Last 12 Months



One-third of companies indicated a positive outlook over the next year and are planning to increase employment levels. Slightly more non-metro employers (36%) compared to metro employers (30%) plan to increase employment levels. Eighteen percent of employers statewide expect to decrease employment.

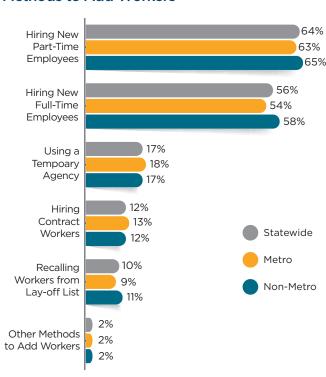
#### Planned Change in Employment Levels Over Next 12 Months



When asked how they plan to add employees, the majority of businesses plan to hire new employees, with more planning to hire part-time employees (64%) than full-time employees (56%). While there is no Missouri trend data on this question, a similar St. Louis area survey conducted this year also shows part-time hiring preferred over full-time. Up until this year that survey had indicated full-time employee hiring was the top choice. It is possible that uncertainties about the global economy or trade disputes are causing businesses to be more cautious in hiring practices this summer.

Other methods include hiring contract workers (12%), using a temporary agency (17%), and recalling workers from a layoff list (10%). Results are similar in both metro and non-metro areas of the state.

#### **Methods to Add Workers**



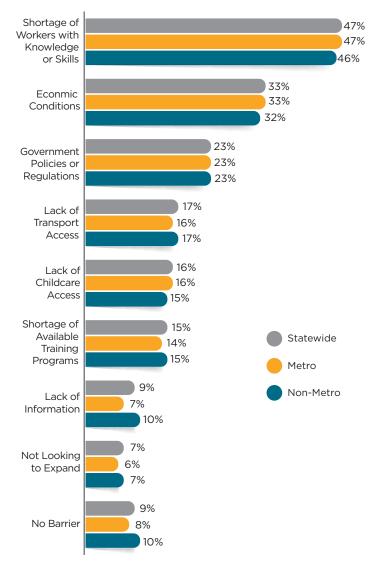


#### BARRIERS TO EXPANDING EMPLOYMENT

Responding to potential barriers to expanding employment, nearly one-half (47%) of Missouri employers indicate a shortage of workers with knowledge of skills are a problem. One-third (33%) replied economic conditions, and nearly one-fourth (23%) mention government policies or regulations. Nearly one in 10 indicate there are no barriers to expanding employment. There was little difference between metro and non-metro employees in survey responses.

It is not surprising that the shortage of workers is the top barrier, given the low unemployment rate in Missouri. The tightening labor market has been an issue for years, as the number of job openings has outpaced the unemployed in Missouri since mid-2017, according to Bureau of Labor Statistics figures.

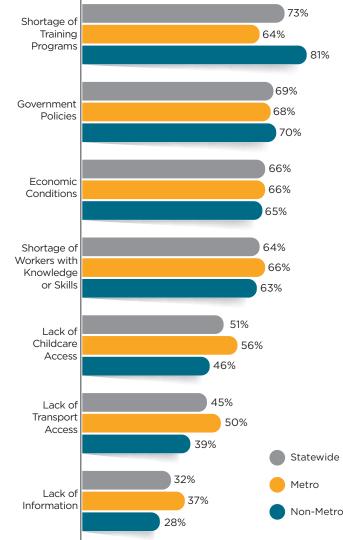
#### Potential Barriers to Expanding Employment



Employers were asked to rank on a scale of 1-5 how important each employment barrier was to their business. The chart below shows how many employers answered four or five, indicating an important or critical barrier. A shortage of training programs is the highest barrier across the state, with significantly more non-metro employers (81%) than metro employers (64%) giving it a score of four or five. Conversely, lack of childcare and lack of transportation is of larger importance in metro areas than non-metro areas.

Although only 15 percent of employers indicate a shortage of training programs was a barrier, 73 percent of those employers rate it a four or five, indicating it is an important barrier. The high importance level placed on training program shortages, while not a top barrier, may indicate what businesses think is an actionable item to address the shortage of available skilled workers.

#### **Important Barriers to Expanding Employment**



## **EMPLOYER SURVEY**

#### CURRENT POSITIONS BY EXPERIENCE AND EDUCATION LEVEL

Employers require occupations with different levels of experience or education, whether that is no experience to several years' experience, or low-skill to high-skill education. Metro and non-metro areas responded similarly so the chart indicates the statewide breakouts by percentage of jobs.

Statewide, 28 percent of employers indicate over one-half of their positions are available to workers with no experience. Thirty-eight percent say they have no jobs that require four or more years' experience. Rates were similar in metro and non-metro areas, with the exception of 32 percent of non-metro employers having over one-half of their positions available to workers with no experience compared to 26 percent of metro areas. A tightening labor market with historically low unemployment rates may be contributing to employers being willing to hire workers with less experience.

High-skill education is defined as a four-year degree or higher. Middle-skill education requires training or education beyond high school, but less than a four-year degree. Low-skill education requires high school diploma or below. Eighty-five percent of employers reported they had some positions available for workers with low-skill education.

Of employers who indicate they have positions accommodating a low-skill education level, 72 percent state over one-half of their positions have this requirement. About one in four businesses had half or more positions requiring middle-skills. Over one-half (55%) of employers had no positions that required high-skill education. About one in 10 companies required high-skill education for half or more jobs.

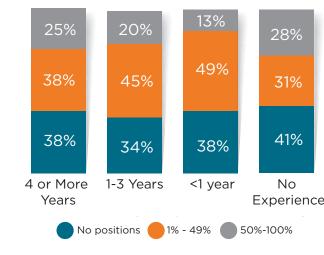
Although many job positions are available for low-skill workers, unemployment rates are still higher for less educated workers. Workers with a high school diploma or equivalent had an unemployment rate of 5.3 percent in 2017, compared to 1.9 percent for people with bachelor's degree or higher. Although low-skill jobs are prevalent, the supply of workers outweighs the demand.

### Missouri Unemployment Rates and Earnings by Education

Unemployment Rate	Educational Attainment	Median Earnings
10.6%	Less than high school graduate	\$21,779
5.3%	High school graduate / GED	\$30,097
3.1%	Some college or associate degree	\$33,653
1.9%	Bachelor's degree or higher	\$54,147*

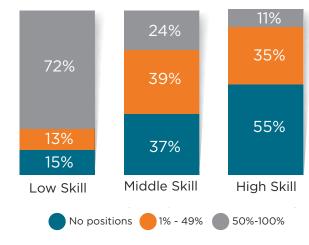
\*BACHELORS (\$48,238) AND GRADUATE (\$60,056) DEGREE MEDIANS SOURCE: 2017 AMERICAN COMMUNITY SURVEY, US CENSUS BUREAU, POPULATION 25+

## Percentage of Positions Requiring the Indicated Level of Experience



NOTE: NUMBERS MAY NOT EQUAL 100% DUE TO ROUNDING

### Percentage of Positions Requiring the Indicated Level of Education



NOTE: NUMBERS MAY NOT EQUAL 100% DUE TO ROUNDING

ALTHOUGH MANY JOB POSITIONS ARE AVAILABLE FOR LOW-SKILL WORKERS, UNEMPLOYMENT RATES ARE STILL HIGHER FOR LESS EDUCATED WORKERS.

#### ADDRESSING COMPANY SKILL SHORTAGES

Twenty-eight percent of employers responded they are experiencing a shortage of skilled applicants. Responses are similar for metro and non-metro areas.

Of the employers that had skill shortages, nearly half (45%) indicate they were in middle-skill jobs, followed by low skill (36%). Non-metro areas had a slightly larger high-skill shortage (21%) than metro areas (18%).

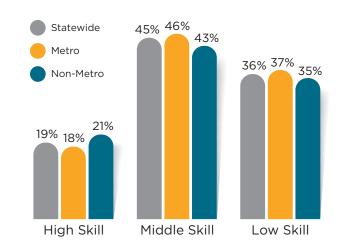
Nearly nine in 10 (87%) employers say they are addressing the skill shortage by hiring less experienced workers and training them. While metro and non-metro areas are equally as likely to train less experienced workers, non-metro areas are more likely to take additional measures such as hiring contractors and hiring outside of the area.

The higher percent of non-metro employers, as compared to metro firms, taking measures to meet the skill shortage may reflect the smaller populations those areas have to draw labor from. Non-metro companies find it more necessary to try different measures to address skill shortages.

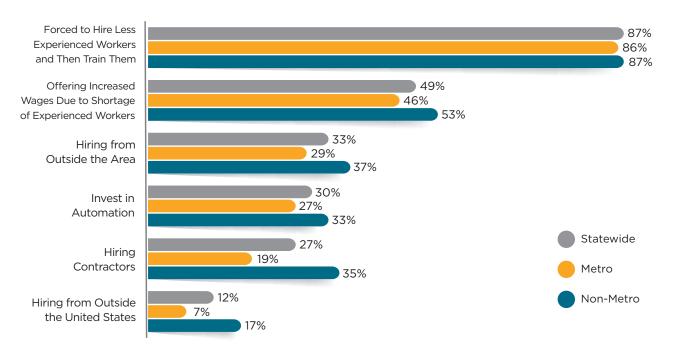
In addition to meeting the skill shortages of new applicants, employers must also address the need for new or increased skills in current employees. Over 90 percent of companies meet the challenge by providing on-the-job training. Almost two-thirds (62%) allow a flexible schedule for continuing education. Nearly one in four use apprenticeship programs or customized training from community colleges. The methods for skilling up were similar for metro and non-metro firms.



## Skill Levels Required to Address Shortages in Job Applicants

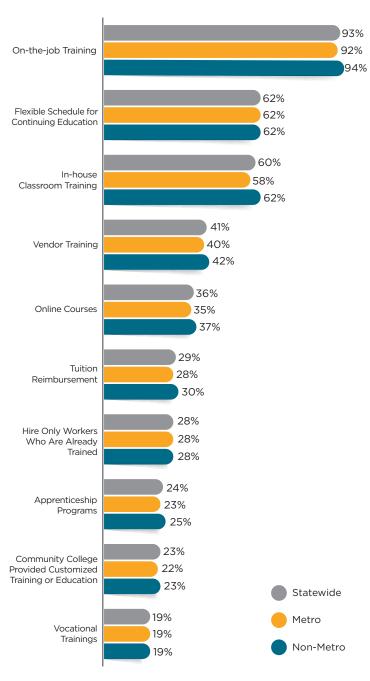


#### Measures Employers are Taking to Meet the Skill Shortages of Applicants



## **EMPLOYER SURVEY**

## Methods to Assist Current Workers in Addressing New or Increased Skills Needs

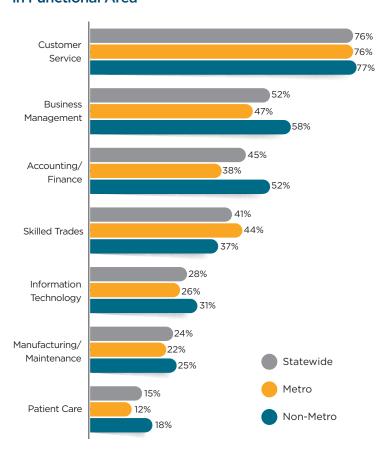


## EMPLOYMENT AND SKILL SHORTAGES BY FUNCTIONAL AREAS

Companies employ workers in a variety of functional areas. Over three-fourths of surveyed firms employ workers in Customer Service. Notably, more non-metro than metro companies stated they employ workers in Business Management, Accounting, and Information Technology. One potential explanation for having more business service functions, like management, accounting, and information technology, in non-metro areas is that these firms, which are smaller on average, require staff that can fulfill multiple functions.

Non-metro firms were also more likely to employ staff in Patient Care; while more metro firms stated they had employees in Skilled Trades. The Health Care industry makes up a larger portion of employers in non-metro areas which can partially explain the difference in Patient Care.

### Percent of Businesses Employing Staff in Functional Area



Companies that indicated they had employees in each functional area were then asked if they were seeing a shortage of skilled applicants in those areas. The largest shortages are in Patient Care, Manufacturing/Maintenance, and Skilled Trades with nearly half or more of firms employing these functions statewide noting a skilled applicant shortage. In non-metro areas, however the shortages are more severe. Around a third of firms that employ information technology staff said they were experiencing applicant shortages in that area.

In every functional area except Accounting, more non-metro than metro firms are experiencing a shortage of skilled applicants.

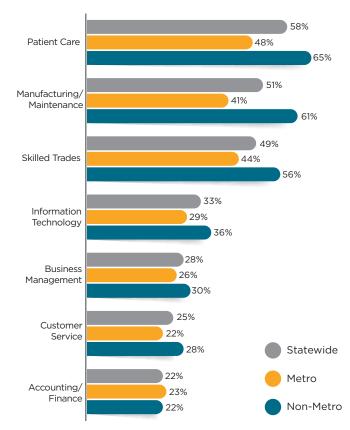
IN EVERY FUNCTIONAL
AREA EXCEPT ACCOUNTING,
MORE NON-METRO
THAN METRO FIRMS ARE
EXPERIENCING A SHORTAGE
OF SKILLED APPLICANTS.

Employers identified the skill level needed to meet applicant shortcomings in each functional area. Middle-skills jobs have the highest percentage of skilled applicant shortages in all areas except for Patient Care and Customer Service. Over one-half of applicant shortcomings in Patient Care were in high-skill jobs, while Customer Service reports 56 percent of shortcomings in low-skill jobs.

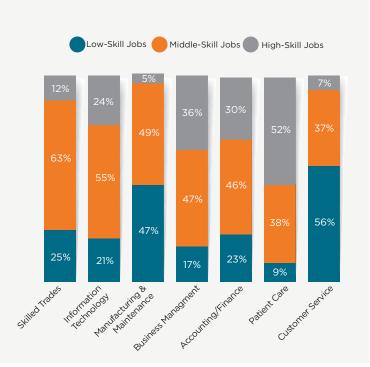
Results are similar in metro and non-metro areas, with a couple exceptions. Metro employers reported a higher Patient Care shortage in low-skill jobs (13%) versus non-metro firms (8%). Metro firms reported significantly more high-skill shortages (35%) in Accounting/Finance than non-metro firms (27%) who faced the top shortage in middle-skill jobs (50%).

Middle-skill jobs are an important part of Missouri's economy and the functional areas shortages demonstrate a clear need. Firms were asked to rate the importance of middle-skilled applicant shortages to their business on a scale of 1-5, with five being the very important. Most employers (85% or more) indicated that middle-skill applicant shortages were important or very important. One hundred percent of employers rate Patient Care a four or five and over 90 percent rate middle-skill applicant shortages in Manufacturing/Maintenance, Skilled Trades, and Business Management as important or very important.

## Businesses Experiencing Shortages of Skilled Applicants in Specified Functional Area



## Skill Level Needed to Meet Functional Skill Shortages Statewide



## **EMPLOYER SURVEY**

#### SHORTCOMINGS OF JOB APPLICANTS

Over 90 percent of surveyed employers reported at least one shortcoming in recent job applicants. The most common shortcoming cited is poor work habits, followed by lack of communication skills and lack of critical thinking and problem solving. Results are similar in metro and non-metro areas, showing these applicant shortcomings, particularly with soft skills, are consistent across the state.

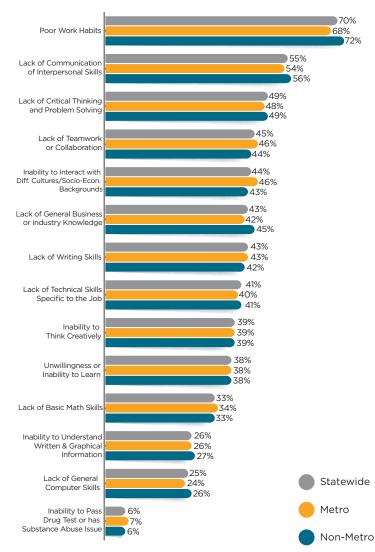
Alternatively, the inability to pass a drug test or have substance abuse issues was noted by only 6 percent of employers but could be low because individuals who suspect they will fail a drug test may not be applying. Lack of computer skills and the inability to understand information were noted by just one in four firms.

After employers indicated job applicant shortcomings, they rated on a scale of 1-5 how important each shortcoming is to their business. The chart below shows how many employers

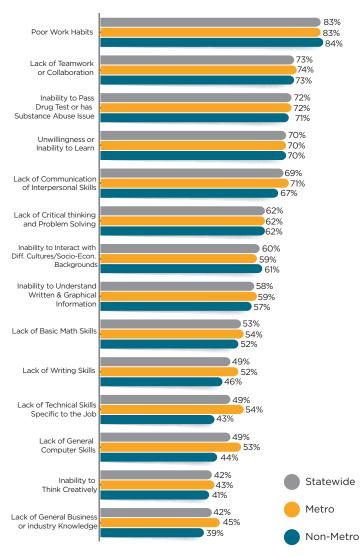
answered four or five, indicating an important or very important shortcoming. Eighty-three percent of employers rate poor work habits as important or very important followed by lack of teamwork (73%).

While only 6 percent said the inability to pass a drug test or substance abuse issues are a shortcoming in applicants, 72 percent of employers rate it a four or five. Although substance abuse issues are not commonly seen in applicants, it is an important concern. Only 45 percent of metro and 39 percent of non-metro firms rate lack of business or industry knowledge as a four or five, indicating employers may be more willing to hire less knowledgeable workers and train them. In general, soft skill shortcomings are viewed as more significant than hard skills that an employer can possibly teach.

#### **Shortcomings of Job Applicants**



#### **Important Applicant Shortcomings**

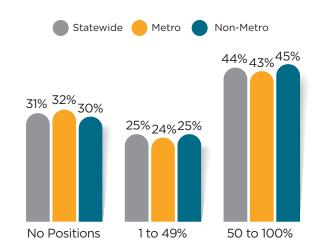


#### **ENTRY-LEVEL OPPORTUNITIES AND HIRING CONSIDERATIONS**

Jobs requiring short-term training are a valuable opportunity for workers starting on their career path, and for displaced workers to obtain new skills to find new employment. Short-term training is defined as no more than six months past high school and relevant to the industry. Over two-thirds (69%) of employers reported they have jobs available to applicants who complete short-term training. Over four in 10 employers report more than one-half of their jobs are available for applicants with short-term training.

Individuals who are justice-involved or have difficulty passing a drug screen or background check often have a tough time finding employment. With low unemployment and high job opening rates, many employers are considering traditionally overlooked groups of potential employees.

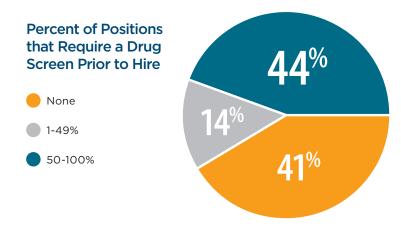
#### Percent of Jobs Available with Short-Term Training



Nearly all employers (98%) require a background check prior to employment for at least one-half of their positions. Results were similar in metro and non-metro areas.

St. Louis metro employers were surveyed about background checks in 2015 and 2019 for the State of St. Louis Workforce Report, conducted by the St. Louis Community College. In 2015, 74 percent of employers reported they required a background check for at least some of their jobs, with that number increasing significantly to 99 percent in 2019. Although there is no statewide data from past years to compare, it seems likely numbers would also have been lower across the state in 2015.

Forty-one percent of employers across the state report they do not require a drug screen prior to hire, whereas, 44 percent test one-half or more of positions. The results are similar for metro and non-metro companies.



Despite nearly all employers requiring background checks, less than one percent of employers stated they would not hire a person convicted of a felony. The 2019 St. Louis metro employer survey also found less than one percent would not hire someone with this background, down significantly from 26 percent of companies in 2015. The tight labor market over the past few years and greater awareness are likely driving this change in the employer survey in St. Louis which is likely mirrored in the state.

Fifteen percent state they would hire someone convicted of a felony for any job they were qualified for. Four in 10 firms said it depends on the type of felony. Results were similar for metro and non-metro employers.



## **EMPLOYER SURVEY**

#### **SUMMARY**

The employer survey gives a view of a thriving job market with more employers increasing than decreasing employment levels over the past year, and one-third planning to add more employees in the coming year. The majority of employers plan to expand by adding part time workers, which may be signaling some caution given global economic uncertainties.

Nearly half (47%) of employers indicated a shortage of skilled workers would be a barrier to expanding employment, followed by one in three that indicated economic conditions. The top potential barrier is not surprising given the low unemployment rate in Missouri.

A majority of companies (72%) had half or more existing positions in low-skilled jobs. One in 10 firms had at least half of all jobs in high-skilled occupations. The survey showed that three-fourths of firms employ Customer Service positions and half Business Management. Accounting/Finance and Skilled Trades were functional activities at four in 10 firms.

Twenty-eight percent of employers state they are experiencing a shortage of skilled applicants. Middle skills were most required (45%) to meet the job applicant shortage, followed by low skills (36%). Patient Care, Manufacturing/Maintenance, and Skilled Trades are particularly vulnerable with 49 percent or more of employers reporting a shortage of skilled applicants in those functional areas. Middle-skilled jobs had the highest percent of skilled applicant shortages in five of the seven functional areas: Skilled Trades (63%), Information Technology (55%), Manufacturing/Maintenance (49%), Business Management (47%), and Accounting/Finance (46%).

The majority of employers address these skill shortages by hiring less experienced workers and training them. Non-metro areas are also more likely than metro areas to offer increased wages to experienced applicants, hire contractors, and hire outside of the area to address skill shortages.

Over 90 percent of employers reported at least one shortcoming in recent job applicants, with poor work habits and lack of communication skills being cited most. The top five reported shortcomings were soft skills that also included lack of problem solving and teamwork skills. Most of these skills are also the top ones advertised in company job postings. Hard skills, such as computer and math knowledge, were at the lower end of shortcomings noted.

Employers are willing to consider justice-involved individuals for employment. While virtually all employers require a background check for job applicants, nearly all are also willing to hire someone convicted of a felony, depending on the job and offense. Being willing to consider applicants who may have previously been overlooked could be a valuable way to fill employers' needs, as well as provide employment opportunities to a larger segment of the population.

Finally, the survey sought to understand how similar or different responses would be for metro and non-metro employers. The responses were remarkably similar across firms, despite the fact that non-metro companies tended to be smaller in size. There were a few exceptions;

- Non-metro employers were more likely than metro companies to employ staff in different functional areas, such as Business Management, Accounting/Financing, and Information Technology. Metro firms were more likely to have Skilled Trade functions. Since, on average, non-metro firms had less employees it is possible staff had to fulfill more roles across functional areas.
- Non-metro firms were more likely than metro employers to take different measures to meet skilled applicant shortages, such as increasing wages, hiring outside the area, or hiring contractors. The smaller population base to draw labor from may partially explain this greater willingness to take alternative measures.
- More non-metro firms reported skilled applicant shortages across every functional area, except Accounting. Differences from metro companies were especially large in Patient Care, Manufacturing/ Maintenance, and Skilled Trades. This also helps explain non-metro firms' greater willingness to take different measures to address applicant shortages.

#### **ACKNOWLEDGEMENTS**

We would like to thank the 1,657 employers who agreed to be interviewed for this survey.

We would also like to thank St. Louis Community College and their Workforce Solutions Group for supporting this effort with survey development assistance. The college has conducted an annual survey of St. Louis companies for over a decade and refined the survey questions over that period to add insights that are implemented in this report.

We would also like to acknowledge the efforts of Singo Solution, Inc. for conducting the survey.

This workforce product was funded by a grant awarded by the U.S. Department of Labor's Employment and Training Administration. The product was created by the recipient and does not necessarily reflect the official position of the U.S. Department of Labor. The U.S. Department of Labor makes no guarantees, warranties, or assurances of any kind, express or implied, with respect to such information, including any information on linked sites and including, but not limited to, accuracy of the information or its completeness, timeliness, usefulness, adequacy, continued availability, or ownership. This product is copyrighted by the institution that created it. Internal use by an organization and/or personal use by an individual for non-commercial purposes is permissible. All other uses require the prior authorization of the copyright owner.

## DATA SOURCES

#### GROSS DOMESTIC PRODUCT

U.S. Bureau of Economic Analysis. Regional Economic Accounts Data: Interactive Tables, Quarterly GDP by State, real GDP in chained dollars.

http://www.bea.gov/regional/index.htm

#### PERSONAL INCOME

U.S. Bureau of Economic Analysis. Regional Economic Accounts Data: Interactive Tables, Annual State Personal Income. Table SAINC1— Personal Income, Population, Per Capita Personal Income; Table SAINC4— Personal Income by Major Component; Table SAINC35— Personal Current Transfer Receipts.

http://www.bea.gov/regional/index.htm

MERIC. 2019. Cost of Living Data Series.

https://meric.mo.gov/data/cost-living-data-series

#### **CIVILIAN LABOR FORCE**

U.S. Census Bureau. Current Population Survey, CPS Table Creator

http://www.census.gov/cps/data/cpstablecreator.html

U.S. Dept. of Labor, Bureau of Labor Statistics. Local Area Unemployment Statistics.

https://www.bls.gov/data/#unemployment

#### **EMPLOYMENT & UNEMPLOYMENT**

U.S. Dept. of Labor, Bureau of Labor Statistics, Local Area Unemployment Statistics.

https://www.bls.gov/data/#unemployment

US Dept. of Labor, Bureau of Labor Statistics, Current Employment Statistics.

https://www.bls.gov/data/#employment

MERIC in cooperation with the U.S. Dept. of Labor, Bureau of Labor Statistics. Quarterly Census of Employment and Wages, micro-data, 2008-2018.

U.S. Department of Labor, Employment and Training Administration (ETA). The Workforce Innovation and Opportunity Act of 2014.

https://www.doleta.gov/wioa/

#### WORKFORCE DEMOGRAPHICS

U.S. Census Bureau. Longitudinal Employer Household Dynamics (LEHD). LED Extraction Tool. Worker characteristics by Sex and Age; by Sex and Education by Race and Ethnicity.

http://ledextract.ces.census.gov

U.S. Census Bureau. American Community Survey (ACS), 2012-2017 Five-Year Estimates. Disability Characteristics. Table DP02.

http://factfinder.census.gov

U.S. Census Bureau. American Community Survey (ACS), 2012-2017 Five-Year Estimates. Age by Language Spoken at Home for the Population 5 Years and Over. Table B16007.

http://factfinder.census.gov

U.S. Census Bureau. American Community Survey (ACS), 2012-2017 Five-Year Estimates. Below Federal Poverty Line for Ages 18-64. Table S1701.

http://factfinder.census.gov

#### **INDUSTRY ANALYSIS**

MERIC in cooperation with the U.S. Dept. of Labor, Bureau of Labor Statistics. Quarterly Census of Employment and Wages (QCEW), micro-data.

#### LABOR MARKET ANALYSIS

MERIC in cooperation with the U.S. Bureau of Labor Statistics.

Local Area Unemployment Statistics (LAUS). Data not seasonally adjusted.

https://meric.mo.gov/data/economic/local-area-unemploymentstatistics/laus

Infogroup© Largest Employers from InfoUSA database.

MERIC in cooperation with Burning Glass Technologies. Labor InsightTM.

#### OCCUPATIONAL PROJECTIONS

MERIC in cooperation with the U.S. Dept. of Labor.

https://meric.mo.gov/workforce-research/occupational-projections

## APPENDIX

#### MISSOURI WORKFORCE DEVELOPMENT REGIONS BY COUNTY

#### Northwest

Andrew Dekalb Livingston Atchison Gentry Mercer Nodaway Buchanan Grundy Caldwell Harrison Putnam Clinton Holt Sullivan Worth Daviess Linn

#### Northeast

Adair Marion Schuvler Clark Monroe Scotland Shelby Knox Montgomery Lewis Pike Warren Lincoln Ralls Randolph Macon

#### **Kansas City**

Cass Clay **Jackson** Platte Ray

#### **West Central**

Bates Benton Pettis Carroll St. Clair Cedar Saline Chariton Henry Verson Hickory

#### Franklin Iefferson St. Charles St. Louis St. Louis City

St. Louis

Iohnson Lafayette

#### Central

Laclede Audrain Maries Boone Callaway Miller Camden Moniteau Cole Morgan Cooper Osage Crawford Phelps Dent Pulaski Gasconade Washington Howard

Barry

Barton Dade Jasper Lawrence McDonald Newton

#### Ozark

Christian Dallas Greene Polk Stone Taney Webster

#### **South Central**

Butler Revnolds Ripley Carter Douglas Shannon Howell Texas Oregon Wayne Ozark Wright

#### Southeast

Bollinger Pemiscot Cape Girardeau Perry Dunklin Ste. Genevieve St. Francois Iron Scott Madison Mississippi Stoddard New Madrid



